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ABSTRACT

This publication provides guidelines to aid administrators, counselors, and business teachers in developing business programs for North Carolina youth. Following a brief introduction, the second of ten sections relates a philosophy of business education to its implications for program development and guidance. Section 3 reviews North Carolina's history of business education. The fourth section discusses the challenges of providing programs in occupational awareness, occupational exploration, and occupational preparation. Section 5 suggests program planning guidelines for administrators and reviews the roles of the administrator, business teacher, youth organization, and the advisory committee. Instructional approaches and evaluation criteria are also outlined. In section 6, functions of guidance in the secondary schools are reviewed; roles and responsibilities of business teachers are discussed in section 7. In section 8, facilities and equipment for modernizing or planning are suggested. Section 9 provides information on the youth organization, Future Business Leaders of America. The final and major portion of the publication contains course guides for various business courses (e.g., accounting, business communications, business dynamics, and business law, etc.). Each guide contains the course description, level, prerequisites, objectives, content outline, sample teaching/learning activities, evaluation, instructional media, and instructional approaches.

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Education for Business

REVISED

Program Planning Guide & Courses of Study

BUSINESS AND OFFICE EDUCATION/OCCUPATIONAL EDUCATION
NORTH CAROLINA DEPARTMENT OF PUBLIC INSTRUCTION



BUSINESS AND OFFICE EDUCATION

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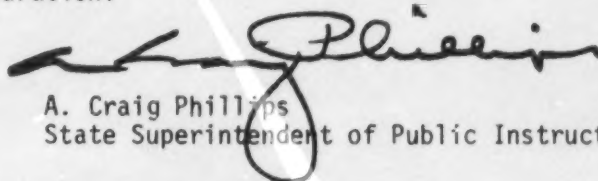
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FOREWORD

Business in our economic free enterprise system plays a vital role in the lives of all citizens. To a large segment of our population, it represents employment, income, and financial security. To an even greater segment, it represents goods and services used in daily living. Business and Office Education, therefore, should occupy a significant place in our secondary school curriculum.

The purpose of this publication is to provide guidelines for administrators, counselors, and business teachers which will help them in developing flexible, relevant business programs for North Carolina youth. These guidelines have been developed to assist administrators, counselors, and business teachers in becoming familiar with career patterns; to promote better articulation between levels of instruction; and to establish an understanding of Business and Office Education throughout the total school program.

Grateful appreciation is expressed to Miss D. Macil Via, Chief Consultant, Business and Office Education, for her recognition of the importance of developing this publication and for her leadership in initiating and guiding its preparation.



A. Craig Phillips
State Superintendent of Public Instruction

September, 1976

PREFACE

This publication is a revision of Education for Business (No. 368), published in 1963. It reflects societal and technological changes occurring in the business world.

Business and Office Education has two major objectives:

- . To provide for the development of occupational skills necessary for initial employment and advancement in a business career.
- . To provide for the development of economic understanding needed for intelligent participation in our economic system of free enterprise.

Since each objective is complementary to the other, students pursuing careers in business should attain competency in both. Therefore, it is imperative that business educators plan balanced business programs in the secondary schools of North Carolina.

The latest concepts in the development of a Business and Office Education curriculum contained in this publication are presented as suggestions for administrators and teachers in developing balanced business programs.

Grateful appreciation is expressed to all those who have participated in the preparation of this publication. Such cooperative efforts will enable us to extend better educational opportunities to the youth of North Carolina.

Charles J. Law, Jr.
Charles J. Law, Jr.
Director
Division of Occupational Education

ACKNOWLEDGEMENTS

Appreciation is expressed to the many business educators and businessmen and women who have given their time and coordinated efforts to make this publication possible.

The contents are the result of a three-year curriculum project under the leadership of the State Consultants for Business and Office Education which included considerable research. Appropriate parts of Publication No. 358, Education for Business, were retained; out-of-date portions were deleted or rewritten.

Sincere appreciation is expressed also to the State Advisory Committee for Business and Office Education, to high school business teachers who participated in curriculum workshops, to Mrs. Lyllis Vuncannon and Dr. George P. Grill who served as directors for the workshops, to Macil Via, Elizabeth A. Douglas, and Katharine B. Meadows, State Consultants for Business and Office Education, and to Peggy Honeycutt and Laura Best, office personnel for Business and Office Education.

Special thanks are given to the business educators from across the State for their valuable contributions.

Section I

INTRODUCTION

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INTRODUCTION

Business Education is a vital, interrelated part of the total educational process encompassing a two-fold purpose -

- . to provide contributions for the economic literacy of all students, and
- . to provide occupational instruction for students desiring careers in business.

In achieving the goal of economic literacy, learning experiences are provided which enable the individual to:

- . understand the structure and function of the American free enterprise system
- . participate intelligently in political, social, and business community life - local, state, national, and international
- . become a wise buyer, user, and producer of business goods and services
- . utilize guidance and employment services
- . comprehend the need for business to realize a fair return on the training time, equipment, and salary invested in a beginning employee
- . evaluate employment opportunities in line with one's interest, aptitudes, abilities, and career objective
- . adapt to the changing requirements of business employment
- . manage personal business affairs as an intelligent citizen through the effective use of communication and computational skills
- . manage finances wisely for personal and family security
- . appreciate the dignity of work
- . exercise honesty, dependability, and good work habits

In achieving the goal of vocational competence, learning experiences extend beyond those included for economic literacy, and will enable the individual to:

- . exhibit competency in specific job tasks

- . understand and practice good human relations
- . understand work flow and the interrelationships of various business functions and procedures

The two goals of Business and Office Education are interdependent in programs designed to develop vocational competency. The goal of economic literacy is important for all students, college-bound and noncollege-bound. Therefore, in order to accomplish the goals of Business and Office Education, business subjects must be available to all students.

Section II

PHILOSOPHY
OF
BUSINESS EDUCATION

PHILOSOPHY OF BUSINESS AND OFFICE EDUCATION

The most viable philosophy for Business and Office Education is given in "A Statement by the Policies Commission for Business and Economic Education"¹ which is quoted in full below:

THIS WE BELIEVE ABOUT BUSINESS EDUCATION IN THE SECONDARY SCHOOL

Major statements of the purposes of education in America have identified a need for business education. Business education achieves its goals through -

Specialized instruction to prepare students for careers in business.

Fundamental instruction to help students assume their economic roles as consumers, workers, and citizens.

Background instruction to assist students in preparing for professional careers requiring advanced study.

In an effort to satisfy the needs of all students, secondary schools should provide sound programs of business education that provide instruction for and about business.

We Believe That

. . . Business education is an effective program of occupational instruction for secondary students desiring careers in business.

. . . Business education has an important contribution to make to the economic literacy of all secondary school students.

. . . Business education is desirable for students who plan programs requiring postsecondary and higher education in the field of business.

¹The Policies Commission for Business and Economic Education, sponsored jointly by the National Business Education Association and Delta Pi Epsilon, was organized in 1959 to bring about a better understanding of what constitutes business and economic education and to render assistance to those who are concerned with the total education of young people.

Program Development

Careers in Business

The occupational program should be related to the needs of business. Therefore, the business curriculum must be flexible and sensitive to changes in business.

We Believe That

. . . Every secondary school should provide opportunities for students to prepare for careers in business.

. . . The time devoted to preparation for business occupations should depend upon the student's abilities, interests, and personal qualities.

. . . The sequence of learning experiences should be planned so that the student will achieve his highest occupational competency upon completion of his program.

. . . Instructional equipment and facilities should be comparable to those found in the businesses where students are likely to be employed.

. . . In-school laboratories that simulate business conditions can be an effective means of providing business education.

. . . On-the-job experience through cooperative education can be an additional effective means of providing business education.

. . . An advisory committee should be involved in planning programs leading to employment in business.

. . . Certificates of occupational proficiency should be awarded to students who develop employable competencies. Proficiency certificates should be recognized as evidence of competency by employers or employment agencies.

. . . Every secondary school should have a youth organization for business students.

Roles as Consumers, Workers, and Citizens

The consumers, workers, and citizens should know how to interpret economic issues which affect them and how to manage their economic affairs efficiently.

We Believe That

. . . Opportunities must be provided for secondary school students to develop an understanding of how our business system operates.

. . . Programs that develop economic understanding should be planned cooperatively with other departments of the school that are concerned with economic education.

. . . Any requirements relating to the development of personal and social economic competencies should be reciprocally recognized by the respective departments of the school.

Guidance

The diversity and comprehensiveness of the business program requires that guidance services be available to all students.

We Believe That

. . . Occupational information and assistance in interpreting that information should be available to all students.

. . . Every student should be assisted in establishing an awareness of his own interests and capabilities so that he may plan his career.

. . . The secondary schools have a direct responsibility to provide occupational counseling, placement, and follow-up of students enrolled in the business program.

Section III

HISTORY OF BUSINESS
EDUCATION IN
NORTH CAROLINA

HISTORY OF BUSINESS EDUCATION IN NORTH CAROLINA

Business Education has had an interesting, progressive historical development in the North Carolina public schools.

Business Education, originally called Commercial Education, was a part of public education in North Carolina from its inception in 1907, when commercial geography was offered by two high schools.

By 1925, 53 of the 697 high schools offered business subjects in spite of the fact that no state course of study was available for guidance in program planning.

From 1926, the history of Business Education in North Carolina parallels the development of state curriculum guides. The first guide was published in 1926; subsequent guides were published in 1935, 1948, and 1963. This curriculum guide is the fifth to be published; and its date of publication, 1976, marks the 50th anniversary of the first state curriculum guide for Business Education in North Carolina.

The 1926 Curriculum Guide. Ten business teachers were appointed as a Committee for Commercial Education by the Superintendent of Public Instruction, prepared a "Course of Study in Commercial Education." This was published in 1926 as pages 183-185 of the Department of Public Instruction's Courses of Study for the High Schools of North Carolina.

The general objectives of high school commercial education were set forth by the Committee as those that "must train for citizenship, provide means of earning a living, and train for personal happiness and enjoyment." Two programs were recommended for high schools - secretarial and "accountancy." Each program included eight business subjects, with the following five subjects included in each: commercial geography, geography and industrial history, junior business training, commercial mathematics, and Typewriting 1.

In 1927, 56 of the 856 public high schools offered business subjects.

The 1935 Curriculum Guide. In this guide, "Commercial Education" was renamed "Business Education". As in the case of the previous guide, this one was prepared by a committee of high school business teachers appointed by the Superintendent of Public Instruction.

The 1935 guide broadened the recommended general objectives of Business Education for the public high schools over those of the 1926 guide. The new objectives included personal-consumer as well as vocational objectives. Concerning these, the Committee stated: "... in addition to the courses of a distinctly vocational nature for those who want to prepare for business employment, a business curriculum should include courses that will meet the personal business needs of all students as consumers and citizens."

The following three curricula were outlined in the 1935 guide: Bookkeeping, Stenographic, and General Business. Each proposed curriculum required a minimum of five subjects, with general business and business law included in each.

In 1936-37, 297 of the 946 public high schools offered business subjects.

The 1948 Curriculum Guide. The basic draft of the third guide was written by business teachers in a curriculum workshop at Woman's College of the University of North Carolina, Greensboro.

In this guide, the general objectives of high school business education were described as "(1) vocational - those that provide preparation for vocational competency and occupational intelligence; and (2) nonvocational - those that provide education for consumer and social-economic efficiency."

Four curricula were included in the 1948 guide: Stenographic, Bookkeeping, Business Foundations, and Clerical. Each proposed curriculum required six business subjects - three vocational and three nonvocational. General business and Typewriting 1 were required subjects in each program.

In 1948-49, 617 of the 958 public high schools, offered business subjects.

The 1963 Curriculum Guide. The fourth curriculum guide for business education was prepared by members of the North Carolina Business Education Council during the term of the first North Carolina State Supervisor for Business Education, Ms. Joyce Bateman.

The general objectives of business education were summarized in this guide as "(1) basic business-economic education for all students and (2) specialized business education for noncollege-bound students . . . and for college-bound students who want to supplement academic education with practical education."

This guide presented a proposed two-way program with concentrations in Shorthand and Business Foundations for one-teacher business departments. The following four programs were outlined for larger business departments: Business Foundations, Stenographic, Manager-Owner, and General Office. The number of business subjects required in each of the proposed concentrations ranged from five to seven, with the following subjects included in each: basic business, Typewriting 1, Bookkeeping 1, and advanced basic business-economic information.

In 1974-75, there were more than 600 junior and senior high schools in North Carolina. Of these, 516 offered one or more business subjects. From the beginning of public high school education in North Carolina to the present, the proportion of the public high schools with business subjects increased from 1.4 percent in 1907 to approximately 84 percent in 1974-75. Doubtless, the interest and efforts of business educators and the guidance offered by business education curriculum guides for a fifty-year period have contributed significantly to the growth of business education in North Carolina.

Section IV

OCCUPATIONAL AWARENESS,
EXPLORATION, AND PREPARATION
MEETING THE CHALLENGE

OCCUPATIONAL AWARENESS, EXPLORATION, AND PREPARATION - MEETING THE CHALLENGE

Schools throughout the nation must help millions of youth to find their place in a changing world. Constructive planning and implementation of the planning are imperative. Appropriate guidance, learning experiences, and quality instruction must be given because the demands of the times are great and the number of individuals engaging daily in business activities as purchasers, consumers, and producers of goods and services is large.

Many opportunities will be available for job seekers in the future. The ability of young people to embrace these opportunities, however, will depend to an important extent upon their educational background. The job world of the future obviously calls for individuals who have marketable skills, skills built upon a balanced educational background.

Will our youth be prepared to meet changing job opportunities and demands? How can the challenge be met?

In an attempt to meet this challenge, education for careers is organized around a conceptual framework encompassing occupational awareness, exploration, and preparation. Through this approach, knowledge unique to business and office occupations is related to understanding the work environment. Students at different educational levels observe, discuss, and practice the use of knowledges and skills in actual or simulated work situations.

Occupational Awareness (K-6)

Although occupational awareness introduces elementary students to a wide range of careers, images and attitudes of particular business careers are being formed in their minds. Discussion topics on where parents work, what they do, and whether they enjoy their work center many times around business and office occupations. Ideas about work roles, job titles, and work settings are expanded as students take field trips to business and industry. In a simulated work situation in a "play" community, students role-play jobs; and the transactions that take place help them realize that jobs grow out of the need for goods and services. Content for developing reading skills reflects work attitudes and other occupational information.

Occupational Exploration (7-8)

Exploration of business and office occupations is part of the occupational exploration program for the state. This program is designed to

provide youngsters with group guidance activities coupled with "hands-on" laboratory activities in which they explore a wide range of careers. The exploration of business and office occupations is integrated in the business laboratory with the marketing, distribution, and communication media occupations.

As business and office occupations are explored, students are assisted in focusing on three aspects of career development: (1) What is important for me? (2) What is possible for me? and (3) What is probable for me? Decision-making skills are utilized as priority career choices and appropriate educational plans are formulated.

For information pertaining to the total program of Occupational Exploration, refer to A Guide for Implementing a Middle Grades Occupational Exploration Program, available from the Occupational Exploration program area of the Division of Occupational Education, State Department of Public Instruction, Raleigh, North Carolina 27611.

Occupational Preparation (9-12)

The high school Business and Office Education program is arranged in career patterns that are directly related to student goals and job opportunities. Career patterns such as Accounting, Stenographic, Clerical, Data Processing, and Business Management may be included. Other career patterns may be designed.

Business and Office Education has much to gain and much to contribute to career development. The business and office preparation program included career development when the following elements are prevalent:

1. Patterns which are job-related and sequential in nature
2. Patterns that are designed to offer flexibility, through options within courses and patterns, as student goals become more clearly defined
3. Integrated learning units within each course and pattern
4. Knowledges and skills necessary for job entrance, adaptation, and advancement
5. Student-centered instruction
6. Simulated and actual work activities which emphasize human interaction, cooperation, communication, responsibility, and work flow
7. Articulation with the program at the junior high and post-secondary levels
8. Opportunities for decision making, problem solving, and values clarification
9. Job-related performance goals in line with student career objective

Summary.

Business and Office Education is an integral part of career development occurring at all educational levels. Articulation of business and office career experiences is critical for an effective sequential program. Coordination is essential, commencing at the elementary level and continuing through the secondary and post-secondary levels. One segment of the program serves as a springboard for the next segment. As educators better coordinate their efforts, students will become better prepared to cope with the complexities of career decisions in a changing society.

GUIDELINES FOR ADMINISTRATORS

Part 1. Planning the Business Program

Every program planner must work within definite limitations; otherwise, each would tend to favor personal specialty and sacrifice balance. Balance is essential for a well-rounded and complete educational program.

In planning business programs consideration must be given to the following:

- . The philosophy and objectives of the local education agency
- . The philosophy of Business and Office Education within the total educational environment
- . Defensible and attainable Business and Office Education objectives against which all educational activities can be evaluated

The scope of any Business Education program must be designed to meet student and community needs. Programs should be planned with balance even though course offerings will vary with school size.

An ideal business program will provide for individual differences and include maximum learning experiences for each student. Program objectives can be achieved only through adequate planning, cooperation, and guidance on the part of administrators, business teachers, and the entire school staff. Coordinated efforts are needed to see that each student pursues a program of studies which will permit the attainment of a meaningful goal.

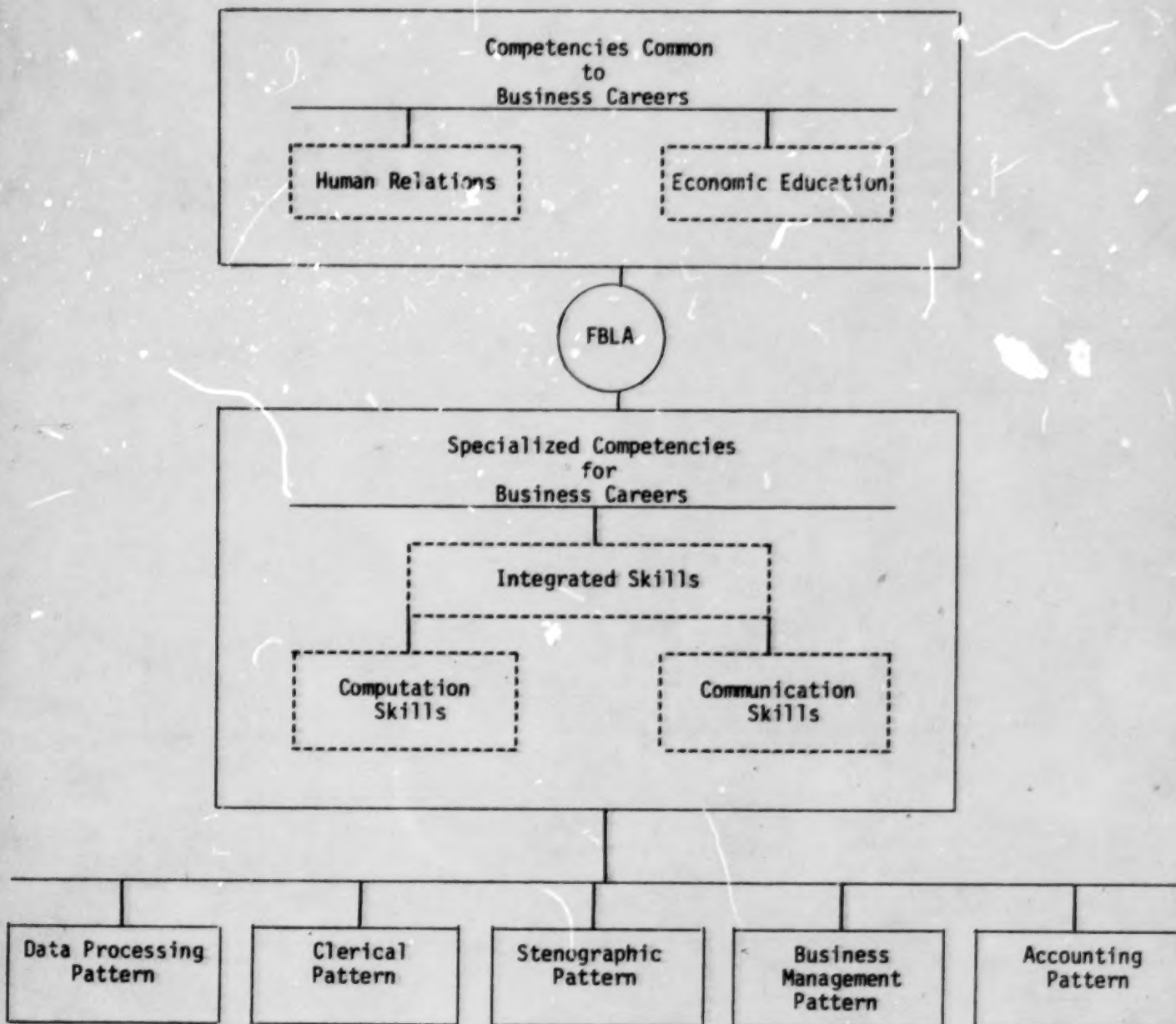
To assist administrators and teachers in planning and implementing effective business programs, suggested career patterns are outlined in this section. Additional patterns may be designed as the need arises. It should be noted that each pattern begins with the same introductory courses: Introduction to Business and Typewriting 1 and 2.

Suggestions are also included for adapting these career patterns to accommodate the small, medium, and large high school.

Each school system should plan the type of balanced business program most feasible for the present and projected nature of its school population, community, staff, and facilities.

Chart I on the following page depicts the relationship of the total business program to business careers. Patterns for various careers involve the development of competencies common to all careers as well as specialized competencies.

Chart I
Suggested Patterns for Business Careers*



*Individual business subjects and FBLA are available to students not vocationally oriented to business careers.

FBLA is an integral part of the total business curriculum and should be emphasized in each business course.

For ease of reference, courses are listed alphabetically below. This curriculum reflects changes needed for planning updated programs. To provide flexibility in planning student-centered programs, some courses traditionally structured as year courses are recommended as two one-semester courses. Furthermore, since typewriting is designed as four semester courses, personal typewriting is no longer needed as a separate course. The basis for this change is that the fundamentals of typewriting are the same regardless of ultimate usage. Also, this provides more options for students and promotes better articulation between the junior high and the senior high business program.

<u>State Course Code Number</u>	<u>Course Title</u>
6332	Accounting I
6333	Accounting II
6412	Business Communications
6532	*Business Dynamics
6522	*Business Economics
6512	*Business Law
6533	Business Management
6311	Business Mathematics
6712	*Data Entry
6722	Data Processing I
6723	**Data Processing II
6010	Introduction to Business
6710	*Introduction to Data Processing
6612	Office Occupations I
6613	**Office Occupations II - Cooperative
6623	**Office Occupations II - Directed
6321	Recordkeeping
6212	Shorthand I
6213	Shorthand II
6633	Simulated Office Training
6111	Typewriting I
6112	Typewriting II
6422	Word Processing

* One-semester courses

** Two-hour-block courses

The Small High School

In the small high school, the business department would consist of one or two teachers. The business program should be designed

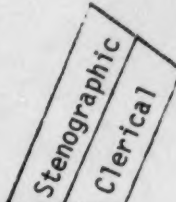
- . to provide a core of learning experiences in basic economic education necessary for intelligent participation in our free enterprise system
- . to provide the widest possible selection of specialized learning experiences to prepare students for job entry.

Although the scope and sequence of course offerings and related learning experiences in the small high school must necessarily be fewer than in larger schools, the basic economic and specialized business course offerings should still be balanced and fulfill as nearly as possible community needs and the needs of students who

- . have post-high school aspirations in the area of business
- . upon graduation are seeking employment in business and office occupations, or are preparing for the ownership or operation of an individually owned business.

Suggested Programs for the Small High School

Two career patterns may be designed for the small high school. Upon completion of either of the two patterns shown below, a student should possess minimum proficiency for job entry.

<u>Grade Levels</u>	<u>Course Titles</u>		
		Stenographic	Clerical
9, 10	Introduction to Business	x	x
9, 10	Typewriting I	x	x
10, 11	Typewriting II or Office Occupations I	x	x
10, 11	Shorthand I	x	
11, 12	Shorthand II	x	
12	Simulated Office Training	x	x

Alterations in program design may be necessary based on the educational needs of a particular school. For example, rather than offering the patterns shown on the previous page, a small high school may choose to offer a modified business program such as the following:

<u>Grade Levels</u>	<u>Course Titles</u>
9, 10	Introduction to Business
9, 10	Typewriting I
10, 11	Typewriting II or Office Occupations I
10, 11, 12	Alternate (Shorthand I
	years (Accounting I
12	Simulated Office Training

An additional option in the modified program is to offer one semester each of Introduction to Business and Business Math rather than a full year of Introduction to Business.

This modified program for the small high school may not necessarily enable a student to develop job-entry skills but should serve as a foundation for further study.

The Medium-Size High School

In the medium-size high school, the business department would consist of three to five teachers. The business program should be designed

- to provide a core of learning experiences in basic economic education necessary for intelligent participation in our free enterprise system
- to provide the widest possible selection of specialized learning experiences to prepare students for job entry
- to provide a work experience program (cooperative or directed)

Suggested Programs for the Medium-Size High School

From the following list of courses, three career patterns may be designed for the medium-size high school. Upon completion of any one of the three patterns shown, a student should possess minimum proficiency for job entry.

<u>Grade Levels</u>	<u>Course Titles</u>	Stenographic Clerical Accounting		
9, 10	Introduction to Business	X	X	X
9, 10	Typewriting I	X	X	X
10	Business Math			X
10, 11	Shorthand I	X		
10, 11	Accounting I			X
11	Office Occupations I	X	X	
11, 12	Business Law		X	
11, 12	Shorthand II	X		
12	Accounting II			X
12	Office Occupations II	X	X	

*Accounting II, second semester, may include internship in lieu of work experience included in Office Occupations II.

Enrichment courses may be offered for juniors and seniors such as business communications, business economics, business dynamics, and introduction to data processing. For developing maximum proficiency, see courses listed in the career patterns shown in this section.

The student who does not desire Office Occupations II (two-hour block with work experience) at grade 12 would enroll in Office Occupations I at grade 11 and in Simulated Office Training at grade 12.

The Large High School

In the large high school, the business department would consist of six or more teachers. Because of the variety of course offerings and related learning experiences feasible in a large high school, and because of the greater specialization of job opportunities available where these schools are located, more specialized business programs can be planned to meet school educational objectives and student and community needs.

Suggested Programs for the Large High School

The school should offer those career patterns which are most applicable to school population, community characteristics, and changing demands of the business world.

Suggested career patterns for the large high school are

- Accounting
- Business Management
- Clerical
- Data Processing
- Stenographic

Selections may be made from these, and others may be developed, as student interests and community needs dictate.

Career Patterns for Business and Office Occupations

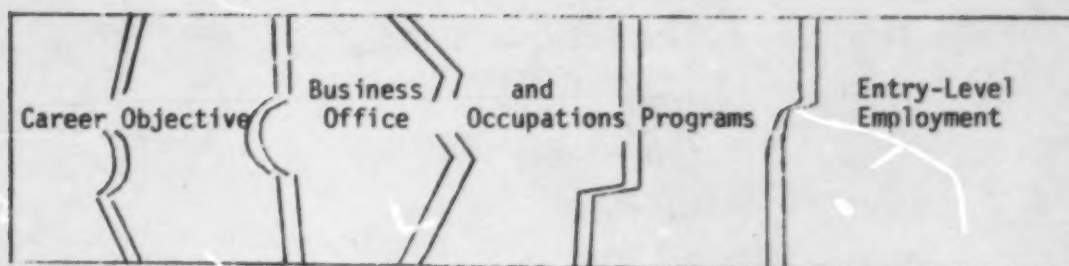
Preparation of qualified workers for business and office occupations demands a planned pattern of education as depicted in Chart II shown on the following page.

The alphabetical listing of course titles shown previously comprises the total course offerings for Business and Office Education in North Carolina. Guidelines for each of these courses are included in Section X of this publication.

From this bank of courses, selections may be made to develop appropriate career patterns. Five suggested career patterns are shown on the following pages.

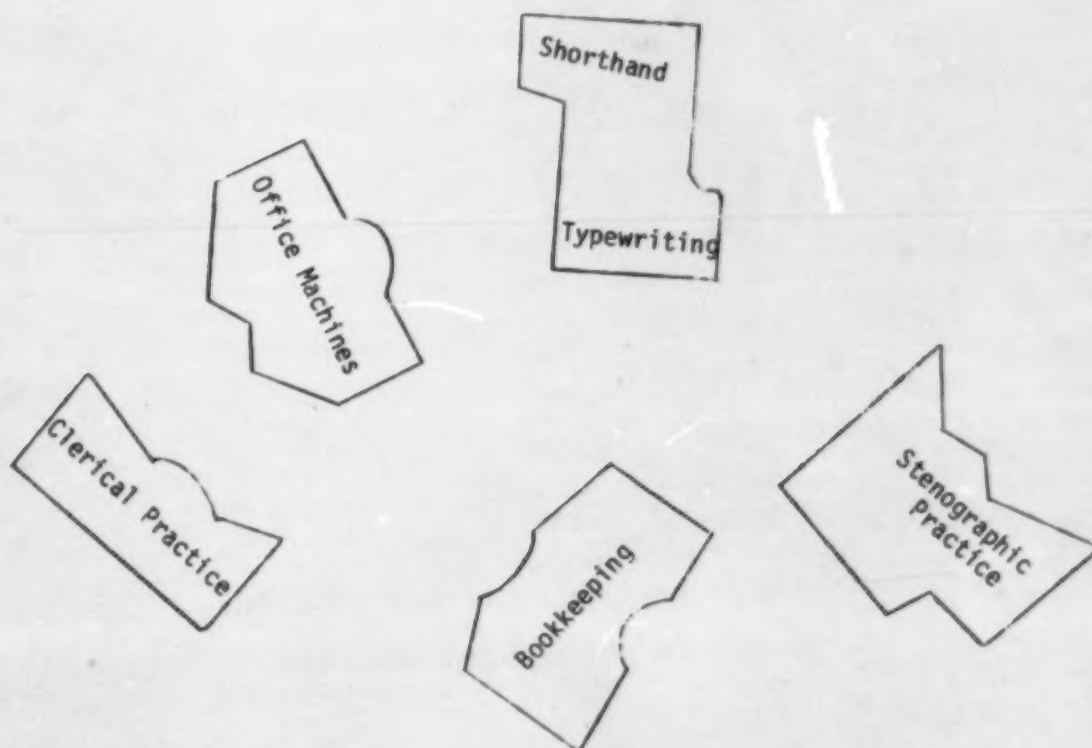
Chart II

BUSINESS AND OFFICE OCCUPATIONS PROGRAMS
provide
Education for the World of Work
not
"How to Run a Machine"



TOGETHER - A Planned Pattern of Education

SEPARATELY - A Fragmented Effort



ACCOUNTING CAREER PATTERN

Introduction. The Accounting Career Pattern is designed to provide students with knowledge and skills necessary for employment in accounting and related occupations.

Suggested Courses and Sequence

<u>Grade Level</u>	<u>Course</u>	<u>Preferred Sequence</u>
9, 10	Introduction to Business	*
9, 10	Typewriting I	*
10	Business Math	*
10, 11	Accounting I	*
10, 11	Introduction to Data Processing	**
11, 12	Business Dynamics	**
11	Business Management (first semester)	**
11, 12	Business Law	*
11, 12	Business Economics	**
12	Accounting II	*
12	Office Occupations II - Cooperative	**

-
- * - Must be completed for minimum proficiency
 - ** - Should be taken for maximum proficiency in addition to those required for minimum proficiency
 - *** - Suggested as enrichment opportunities

BUSINESS MANAGEMENT CAREER PATTERN

Introduction. The Business Management Career Pattern is designed for students whose career objectives are directed toward the possibility of:

- . Owning or directing a small business.
- . Taking a place in a small business already established.
- . Working in a large business in a non-technical or pre-managerial capacity.

<u>Suggested Courses and Sequence</u>		
<u>Grade Level</u>	<u>Course</u>	<u>Preferred Sequence</u>
9, 10	Introduction to Business	*
9, 10	Typewriting I	*
10	Business Mathematics I	**
11, 12	Business Law	*
11, 12	Business Dynamics	**
11, 12	Business Economics	**
11, 12	Introduction to Data Processing	*
11, 12	Business Communications or Word Processing	**
11, 12	Accounting I	*
11, 12	Accounting II	***
12	Business Management	*
12	Office Occupations II - Cooperative	**

* - Must be completed for minimum proficiency

** - Should be taken for maximum proficiency in addition to those required for minimum proficiency

*** - Suggested as enrichment opportunities

CLERICAL CAREER PATTERN

Introduction. The Clerical Career Pattern is designed for students desiring office jobs that do not require shorthand skills. The increasing demand for qualified clerical office employees provides extensive opportunities for high school graduates.

Office positions of a clerical nature may include: typist, clerk-typist, receptionist, file clerk, general office clerk, mail clerk, and others.

Suggested Courses and Sequence

<u>Grade Level</u>	<u>Course</u>	<u>Preferred Sequence</u>
9, 10	Introduction to Business	*
9, 10	Typewriting I	*
10	Business Mathematics	**
10	Introduction to Data Processing	**
10, 11	Recordkeeping	**
	or	
10, 11	Accounting I	**
11	Typewriting II	**
11	Office Occupations I	*
11, 12	Business Communications	**
	or	
	Word Processing	**
11, 12	Business Law	**
11, 12	Business Dynamics	**
11, 12	Business Economics	**
12	Office Occupations II - Cooperative or Directed	*

-
- * - Must be completed for minimum proficiency
 - ** - Should be taken for maximum proficiency in addition to those required for minimum proficiency
 - *** - Suggested as enrichment opportunities

DATA PROCESSING CAREER PATTERN

Introduction. The Data Processing Career Pattern provides a framework of suggested studies designed to prepare students for entry-level positions in automated data processing and related occupations as described in the Third Edition of the Dictionary of Occupational Titles.

Suggested Courses and Sequence

<u>Grade Level</u>	<u>Course</u>	<u>Preferred Sequence</u>
9, 10	Introduction to Business	*
9, 10	Typewriting I	*
9, 10	Business Math	*
11	Accounting I (first semester)	*
11	Data Processing I	*
11, 12	Business Law	***
11, 12	Business Economics	***
11, 12	Business Communications	**
	or	
	Word Processing	**
12	Data Processing II - 2 hour block (for those students interested in & capable of programming)	*
	or	
	Office Occupations II - Cooperative or Directed (for those students desiring to be equipment operators)	*

-
- * - Must be completed for minimum proficiency
 - ** - Should be taken for maximum proficiency in addition to those required for minimum proficiency
 - *** - Suggested as enrichment opportunities

STENOGRAPHIC CAREER PATTERN

Introduction. The Stenographic Career Pattern is designed for students with a career objective in the area of stenographic, secretarial, and related occupations. The suggested pattern is sufficiently flexible to permit adaptation of the program at local levels according to community needs and student interests.

<u>Grade Level</u>	<u>Suggested Courses and Sequence</u> <u>Course</u>	<u>Preferred Sequence</u>
9, 10	Introduction to Business	*
9, 10	Typewriting I	*
10	Business Mathematics (first semester)	**
10	Introduction to Data Processing	**
10, 11	Typewriting II	**
10, 11	Shorthand I	*
10, 11	Recordkeeping	**
10, 11	Accounting I or	**
11	Office Occupations I	*
11, 12	Business Communications or Word Processing	**
11, 12	Shorthand II	*
11, 12	Business Law	**
11, 12	Business Dynamics	**
11, 12	Business Economics	**
12	Office Occupations II - Cooperative or Directed	*

* - Must be completed for minimum proficiency

** - Should be taken for maximum proficiency in addition to those required for minimum proficiency

*** - Suggested as enrichment opportunities

Part 2. *The Role of the Administrator in Guidance*

The following suggestions are made for administrators regarding the relationship of guidance services to the business program:

- . Administrators should work with business teachers in planning the business schedule
- . All subjects should be taught by teachers competent in the area of instruction.
- . Introduction to business and beginning typewriting should be open to all interested students.
- . When enrolling students in shorthand, administrators should keep in mind that a good background in English, spelling, and vocabulary is required for stenographic occupations.
- . Students enrolling in shorthand should have successfully completed beginning typewriting.
- . Shorthand students should have access to typewriters for transcription purposes.
- . Administrators, guidance counselors, business teachers, and students should confer regarding enrollment of students in advanced business courses.
- . Duplicating, recordkeeping, and typewriting assignments, in connection with the operation of the school should be scheduled as learning activities for students. Such work should not be required as a school service beyond the learning stage.
- . Administrators, guidance counselors, business teachers, students, parents, and prospective employers should confer regarding job placement and follow-up of graduates.
- . Alternatives and options should be available in the business program in line with student and community needs.

Additional suggestions regarding guidance services are included in Section VI of this guide.

Part 3. *The Business Teacher*

The professional business teacher should:

- . Create and maintain a good teaching/learning environment
- . Establish rapport with co-workers, students, and community
- . Fulfill expectations of self, local supervisors, and State staff
- . Continue educational growth through formal graduate programs; self-evaluation and improvement methods; professional reading; and internship opportunities which may provide real work experience
- . Become actively involved in professional organizations
- . Be informed about the policies and activities of the local government

Local education agency (LEA) administrators can promote professionalism among business teachers by:

- . Creating a climate for innovations
- . Promoting open channels of communication
- . Providing opportunities for teacher input in planning programs and facilities and in purchasing equipment and instructional materials
- . Allocating an adequate departmental budget
- . Encouraging teachers to grow professionally and personally by providing relevant staff development activities
- . Providing incentive, through the local salary scale, for teachers to pursue additional formal education for advanced ratings and/or degrees
- . Providing each teacher with at least one planning period a day
- . Providing release time for teachers to attend professional meetings
- . Providing release time for teachers to attend district, state, and regional youth organization activities

Additional suggestions regarding the business teacher are included in Section VII of this guide.

Part 4. *Youth Organization - FBLA*

All business students should be encouraged to become active members of a youth organization related to their career choice.

Future Business Leaders of America (FBLA), a national organization, is recognized by the North Carolina Board of Education as the official youth organization for business students. The Board emphasizes that FBLA activities should be an integral part of the total business program. The State Department of Public Instruction encourages local administrators to allot time during the school day for youth organization activities.

Membership in FBLA reinforces classroom activities, deepens career interests, and broadens career goals. Participation in chapter activities enables members to develop poise, decision-making powers, responsible attitudes, ability to speak before groups, and other qualities of leadership. Participation in social activities at local, state, and national levels provides opportunities for student members to experience social growth. Details concerning North Carolina FBLA may be found in Section IX of this guide.

Part 5. *Facilities, Equipment, and Materials*

The entire education program should be considered in locating the business department within the school plant. Rooms for business instruction should be located near each other. Since equipment such as typewriters and other business machines will produce noise, an effort must be made to avoid acoustical problems which may conflict with other activities.

The number of classrooms needed will depend on school enrollment, the variety of career patterns in the business program, and business student enrollment.

The instructional program in Business and Office Education requires a wide variety of office equipment, including electric typewriters, electronic calculators, reprographic equipment, data processing equipment, and automatic (power) typewriters. Labor market trends and research studies indicate that competencies required in business and office careers demand proficiency on such equipment.

Since the typewriter is the basic tool of the office worker, it is unrealistic for schools to limit typewriting instruction to the manual machine. In support of this premise, Erickson says,

Because of the high frequency of use of electric typewriters in the business office, all typewriting students must have opportunities to learn to use the electric typewriter.

¹Dr. Lawrence W. Erickson, Basic Components of Office Work--An Analysis of 300 Office Jobs, South-Western Monograph No. 123, 1971, p.23

While modern office equipment is costly, if business education is to meet its objectives, schools must accept responsibility for providing realistic learning experiences.

The instructional program in business should be individualized for each student, thereby requiring a wide variety of instructional materials and consumable supplies. Therefore, an adequate sum of money should be allotted to the business department annually to meet these costs. Students enrolled in business courses should not be required to pay fees for the purchase of instructional materials and supplies.

For detailed information regarding facilities, equipment, and materials, please refer to Section VIII of this guide, which lists recommendations by the State Department of Public Instruction.

Part 6. Instructional Approaches and Techniques

The scope of instruction in business education is expanding to meet new challenges and to keep pace with the radical and swift changes in the business environment. Greater emphasis is being placed on teaching conceptual skills as well as manipulative skills. Such skills include fact gathering, interpretation, problem solving, and decision making. Greater emphasis must also be placed on management ability if students are to meet requirements for job advancement.

The teaching approaches to help students develop their maximum talents and skills must be planned. They should include a search for instructional alternatives as a way to improve the instructional process.

There are several major teaching strategies used in the learning process of Business Education. These strategies may be developed through a variety of instructional approaches and teaching activities.

Individual Instruction Approach

Each student is treated as an individual as to his/her interests, skills, and abilities. With the teacher's guidance, students select projects and activities in which they have an interest and their skills are developed to meet the objectives of the selected project or activity.

Repetitive Practice Technique--Drills or exercises are completed until the skill or unit is learned.

Job Instruction Sheet Technique--Detailed steps and instructions are mapped out for the student to follow in completing a unit of work.

Individually Prescribed Instruction (IPI) Technique--Students are permitted to progress at a rate commensurate with their abilities and ambitions, learning by various processes which suit their needs and preferences.

Learning Activity Package (LAP) Technique--Instructions, steps, and pictures are presented in systematic order to explain in detail a concept or skill to be learned without the teacher's direct assistance.

Homework Technique--Extra work, drills, or exercises are to be done outside of class to reinforce a learning activity.

Programmed Instruction Technique--A concept is presented to the student; he/she attempts to choose a correct answer to a question concerning that concept; the student then gets immediate reward for a correct answer or explanation for an incorrect answer.

Discovery Approach

Each student selects his/her own problem or topic for researching and reporting. The problem or topic might involve the effect of labor relations on the job by recent government regulatory actions; the possible effect of a current judicial decision on the legal right involving landlord/tenant relations; a job study analyzing the tasks of a legal secretary; conducting or participating in surveys; debating an ecological issue; etc.

Research Technique--Each student selects his/her own problem about which to gather information and report.

Job Studies Technique--Studying and analyzing a given job and arriving at a conclusion.

Surveys Technique--Conducting and compiling facts or figures to arrive at an answer or conclusion.

Group Approach

A number of students select a group project in which each member of the group will organize, plan, and produce ideas and work in the completion of one major study or project.

- . Large- or Small- Group Technique--Controlling the size of the group to one which will be more efficient in completing a task.
- . Committee Participation Technique--Forming committees which deal with specific problems or areas.
- . Battery Technique--Presenting ideas to the class as a whole and then allowing students to work individually on mastering the concepts presented.
- . Role-Playing Technique--Hypothetical but representative circumstances involving interpersonal relationships are established, and participants take roles in which they act and react spontaneously. It is a method of human interaction that involves realistic behavior in an imaginary situation.
- . Discussion Technique--The teacher and student present concepts and discuss the pros and cons of a particular topic. This technique may be used in all instructional areas.

Unit Approach

Classes involved in a unit approach seek answers to data concerning one particular area of thought and work and then relate this information to broader topics in the course.

- . Module Technique--A specialized unit of instruction based on time constraints, i.e., minute(s), hour(s), day(s).
- . Case Studies Technique--The student researches, organizes, interprets, and becomes skillful in decision making. The use of various games and exercises provides the potential secretary with experiences that are related to the actual work in the business field.
- . Rotation Plan Technique--Students rotate from one project to another. For instance, when a limited number of adding machines are available, some students may be doing typing assignments as the others use the machines. When the work at the adding machines is completed, both groups will exchange places.

Systems Approach

Classes using a systems approach use a group of devices in which one specific field of work is traced through each facet of its relation to the whole picture.

- . Project or Practice Set Techniques--One phase of work in

Bookkeeping, Record Keeping, or other business subjects is studied and completed from its origin to the termination of the transaction or activity. For example, a written check would be studied and traced from its creation to its return by the bank.

- . Field Trip Technique--A way of learning in which students go to the actual place where they see the reality of the concepts they have been studying.

Multimedia Approach

A system in which a number of devices are utilized for instruction such as films, tapes, pacing devices, visuals, programmed instruction, records, etc.

The techniques used in this approach encompass as many methods and devices as are available and appropriate in achieving desired learning or changes in behavior or attitude. The following are among the techniques available:

- Demonstration
- Multi-Channel Laboratory Playback Equipment
- Films and Filmstrips
- Overhead Projection Transparencies
- Videotape Presentations
- Audio-Tutorial Slide-Tape Presentations
- Dictation-Transcription Equipment
- Record-Players
- Skill-Builder Controlled Reader
- Tape Recorders
- Chalkboard
- Slides
- Lectures
- Field Trips
- Exhibits

CoCurricular Approach/Future Business Leaders of America

A student organization made up of students taking business subjects and interested in business as a career. It endeavors to develop leadership ability in the students, student confidence, and an awareness in community service, and helps them become better citizens.

Techniques the youth organization employs to teach and facilitate learning are:

- Leadership Training
- Committee Activities
- Community/School Relations
- Competitive Events

(See Section IX of this guide and the FBLA State Handbook.)

Laboratory Approach

An intense environment that duplicates an actual business establishment. It is an application of previously learned knowledges and skills to an actual office environment rather than initial development for the first time.

- Training Station, On-the-Job Training, or Cooperative Office Occupations (COO) Technique--Teaching correlated with instruction on the job. A training station, often defined as a downtown lab, provides an opportunity for the student to practice on the job what he/she has learned at school.
- Simulation Technique--Involvement in the ongoing, daily operation of a fictionalized company. The facilities are like those seen in a real office. Simulation emphasizes group learning in which the primary relationships are between the several people in the group and wherein they learn to work together. A model office in Office Occupations II offer an ideal way of utilizing simulation.
- Project or Practice Set Technique--Integrated tasks in which the entire working of a company is put together through representative jobs from each department of the company.
- Problem-Solving Technique--A deductive method of reasoning to arrive at a solution to a given problem. A particular set of happenings in an office is presented to students. They analyze each phase of the situation and come to a conclusion as to the best solution to the situation.

Part 7. Evaluation

An essential component of any business program is a built-in evaluation system. Planned evaluation and re-evaluation must occur in order to update and improve instruction. The evaluation should be well planned and administered cooperatively by business teachers, guidance counselors, students, business representatives, and administrators.

As a basis for evaluation, all business teachers in a local education agency should prepare and follow course syllabi applicable to their respective schools. In preparing local syllabi, teachers should refer to the State business education curriculum guidelines¹ which include suggestions to assist local education agencies in planning business programs to meet local needs.

It is suggested that program evaluation determine to what extent the business department

- . has a philosophy and a set of objectives in line with the school's overall philosophy and objectives and the local plan for occupational education
- . develops vocational competency and economic literacy
- . meets the needs of college and non college-bound students
- . has qualified personnel accountable for their knowledge of subject matter, instructional approaches, and educational psychology
- . has staff members who are concerned with helping students overcome learning difficulties
- . selects and uses effective instructional materials and various instructional approaches
- . creates opportunities to work closely with administrators, guidance counselors, and business representatives in planning, implementing, and evaluating instruction in line with student needs and labor market demands
- . utilizes available community resources to enrich instruction

¹References include Education for Business, Revised, State Course of Study K-12, and Occupational Education Program of Studies.

- . shares responsibility of guiding students through cooperation with school guidance services
- . promotes good public relations
- . organizes and promotes youth organization activities (FBLA) as an integral part of instruction in each business course
- . acquires and uses up-to-date equipment, as justified by business survey results
- . maintains an organized file of student information to more effectively diagnose needs, evaluate progress, and use follow-up information
- . maintains a definite policy and plan for purchase, replacement, and upkeep of equipment
- . promotes cross-discipline planning and instruction
- . participate in professional organizations

For reimbursed Business and Office Education programs, reference is made to specific responsibilities for program evaluation by a local education agency as outlined in the North Carolina State Plan for Occupational Education:

Each local education agency providing occupational education programs, services, or activities shall annually review each objective set forth in the approved local plan.

The evaluations will be conducted to determine progress toward the achievement of long-range goals as a basis for making decisions for subsequent annual plans.

Evaluation methods which may be used at the local level include:

1. self-study of status and achievement of objectives in local plan;
2. follow-up studies of graduates;
3. advisory committee reviews;
4. employer interviews and reactions to programs;
5. administration of performance tests to exiting students;
6. evaluations by accrediting agencies;
7. submission of evaluation findings to the State Board staff.

¹State Board of Education, North Carolina State Plan for Occupational Education, FY 1976, State Department of Education, Raleigh, p. 33.

Part 8. Vocationally Reimbursed Programs

Since the passage of the Vocational Education Act of 1963 and subsequent amendments (1968, 1972), Business and Office Education has become an integral part of the "vocational" family. It is now possible for secondary schools to obtain vocational funding for initiating and improving the vocational aspect of their Business Education programs. As with any vocational (federally reimbursed) program, LEAs must meet certain requirements and adhere to policies established by the Division of Occupational Education of the North Carolina State Department of Public Instruction. These requirements and policies are outlined in detail in the Occupational Education Program of Studies and the Fiscal/Statistical Guide.

This section on reimbursed programs in Business Education is designed to answer the most often asked questions concerning planning, implementing, and funding the vocational aspect of a business program. "Program" as used in this section does not refer to the entire Business Education program or curriculum, but rather to the vocationally reimbursed business program(s).

Any of the following courses in the business curriculum qualifies for vocational reimbursement.

6333	Accounting II	6712	Data Entry
6533	Business Management	6213	Shorthand II
6722	Data Processing I	6633	Simulated Office
6723	Data Processing II		Training
6612	Office Occupations I		
6613	Office Occupations II - Cooperative		
6623	Office Occupations II - Directed		

Any vocationally certified instructor teaching one of the above courses for no less than one period a day will be eligible for vocational reimbursement. In addition for reimbursement purposes, all other courses taught by that instructor must be one of those found on the Business and Office Education Scope and Sequence Chart. 6633 or 6613/6623 must be offered in order for 6612 to be eligible for vocational reimbursement; 6723 must be offered in order for 6722 to be reimbursed.

The following steps should be followed in initiating such programs:

1. LEA administrators (superintendents, principals, local directors/planners, supervisors) should work with the total business teaching staff and the guidance staff in developing a positive working philosophy in their respective schools.
2. The LEA should appoint a committee composed of interested employers, parents, and educators to perform the following activities:
 - . conduct surveys of student and parent interests
 - . conduct community and job opportunity surveys
 - . identify a permanent advisory committee

3. The LEA must include projected reimbursed business programs (as a component of the total business program) in the local occupational education plan, which is submitted to the State agency for approval.
4. The LEA should obtain information from the Occupational Education Division, State Department of Public Instruction, concerning teacher qualifications and certification requirements, recommended curricula, equipment lists, and other requirements for reimbursed programs.
5. Business teacher coordinators should select suitable work stations for students in work experience programs, using advice and assistance of their advisory committees.
6. Business teachers and guidance personnel should publicize the programs to potential student enrollees and to the local community.
7. Business teachers and guidance counselors should select students for work experience programs through individual interviews with students and parents.

Part 9. Advisory Committee

The Business and Office Education Advisory Committee should serve as an integral part of the total business department. An advisory committee represents the business community. It provides up-to-date information about business practices for work experience programs and gives suggestions for upgrading and improving the total business curriculum.

Suggested functions of an advisory committee are to assist with the following:

- . Community surveys
- . Research studies
- . General training policies
- . Course outlines based on business needs
- . Qualifications of teachers
- . Placement of students
- . Evaluation of programs
- . Development of a good public relations program
- . Legislation
- . Facilities and equipment
- . Financial support
- . Cooperative training plans
- . Wage scales for various occupations
- . Youth organization activities

Local administrators should appoint persons to serve on advisory committees. This committee may have from five to eight members, representing the school, parents, and business. At least two business teachers, one of them a reimbursed teacher and the other a non-reimbursed teacher, should work with the advisory committee chairman in planning worthwhile meetings and projects. It is important that the committee chairman be a dynamic person who can promote an active committee.

SECTION VI
GUIDANCE IN THE SECONDARY SCHOOLS

GUIDANCE IN THE SECONDARY SCHOOLS

The function of guidance in all secondary school programs of studies is to assist students to understand themselves better and to use this understanding in the choices and adjustments they must make now and in the future. To fulfill this function, the secondary school organizes its guidance program around a series of services. These services are:

Student Appraisal. There should be a continuous recording of data on each student in the school. Techniques of obtaining data might include the use of anecdotal reports, rating scales, self-appraisal instruments, autobiographies, socio-metric devices, and standardized tests. Most schools have found that organizing these data in the form of the cumulative record is helpful.

Counseling. Counseling should be the major means through which guidance is accomplished. It is a personal relationship developed through interviews by which students are enabled to see themselves as individuals with special abilities and limitations and to relate this knowledge to the changing world in which they live.

Placement. This service includes helping students determine subsequent steps in their careers and is based on a program of student appraisal and counseling. It involves placement within the high school curriculum, for advanced study, and job placement.

Information Service. This service should make available to students up-to-date information concerning job opportunities and opportunities for further study through books, files, pamphlets, directories, and related materials.

Follow-up. A follow-up study should include graduates and dropouts. The information gained should reveal the adequacy of the school program in meeting the educational needs of students.

Contributions of Business Teachers

An effective guidance service should be organized and directed by an individual with special guidance knowledges, understandings, and skills; and by one who enlists the cooperation of all staff members. Guidance is not the sole responsibility of any single staff member.

Business teachers, by nature of their professional background and experience, have a unique contribution to make to an effective guidance program. They should take the initiative to hold several meetings with the guidance personnel each year, at which time all business teachers

should be present to discuss cooperative efforts between the guidance service and the business department. Following are specific ways in which the business teacher may contribute to the guidance program:

Student Appraisal. The closeness of business teachers to students provides a unique opportunity for teachers to assist in student appraisal. Some specific ways in which they can contribute are to:

- . Make the counselor aware of the knowledges, skills and abilities needed by students to perform satisfactorily in business occupations
- . Discover strengths and weaknesses of students enrolled in business courses and make such information available through guidance services
- . Contribute to an accurate and complete file of student personal qualifications, skill competencies, grades, and other anecdotal information as would enhance the guidance service
- . Prepare a report of student work experience for cumulative records
- . Encourage administering of appropriate tests as a basis for counseling students more effectively
- . Provide a record of proficiency certificates earned by each student

Counseling. Since counseling is a major component of the guidance service, the business teacher has responsibilities for contributing to this function. Some of these responsibilities are to:

- . Provide individual counseling to the extent possible and make referrals when necessary
- . Assist students in selecting specific courses in line with their interests, aptitudes, and needs in order to obtain optimum benefits
- . Help students relate specific skills to various job requirements
- . Assist students in the development of desirable personal traits and habits
- . Help students understand the changes in the business environment
- . Help students realize that earning a living is a challenge and that adjustments are a life-long process
- . Help each student develop self-confidence and self-esteem

Placement. Business teachers can contribute to student placement (in courses or on jobs in or out of school) in the following ways:

- . Assist students in course selection in line with interests, aptitudes, and needs

- . Make available information on colleges and schools in which students may continue their education
- . Assist students in developing competency in applying for a job and acquaint them with personal characteristics and adjustments necessary for job retention and advancement
- . Establish and/or work with a school placement bureau
- . Cooperate with local employment agencies
- . Use results of community surveys to determine job opportunities for student placement
- . Work with guidance counselors and prospective employers in placing students in cooperative work programs and in summer positions

Information Service. Specific ways in which business teachers can assist in providing job entry and advanced study information to students are to:

- . Establish an information file in the business department
- . Make use of community resources through field trips, speakers, and materials
- . Inform students of available scholarships and student aid programs
- . Cooperate with media and guidance personnel in the selection and use of resource materials
- . Assist in organizing and conducting community surveys
- . Interpret and promote the business program to the total school and community
- . Serve as resource persons to provide counselors, teachers, and students with information about the scope and sequence of the business program

Follow-up. Business teachers, guidance counselors, local director/planners, and advisory committee members should work together in making follow-up studies of business students to determine student adjustment and progress in chosen pursuits and to determine appropriateness of choices. The information gained from such a study should be useful in evaluating the adequacy of the business program. Business teachers can contribute to follow-up studies in the following ways:

- . Assist in compiling, tabulating, editing, and duplicating results of follow-up studies of business graduates and dropouts
- . Maintain a file of follow-up study results
- . Use follow-up survey data as basis for instructional planning to stress the importance of acquiring skill competencies and knowledge and developing desirable personal traits
- . Upon request, assist former students in securing jobs or in planning for further education

- . Cooperate with post-secondary institutions in providing vocational and technical programs for adults in an effort to improve the educational level of community

Suggestions for Counselors

With the assistance of business teachers, counselors should become familiar with the objectives of the business program, the various courses offered, and the abilities and skills required in each course. The following suggestions relate to certain areas of study within the business program:

- . Introduction to business provides information on consumer education and the free enterprise system needed by students
- . Beginning typewriting should be available to all students
- . Notetaking, a one-semester course, should be taken for the purpose of learning to take notes, not for developing skill in the taking of verbatim dictation
- . Business math should be a prerequisite for accounting and record-keeping
- . Students interested in occupations in the accounting cluster should be assisted in their selection of either recordkeeping or accounting based on their mathematical ability
- . Because of the complexity of transcription skills, students interested in occupations in the stenographic cluster should be screened carefully
- . Student enrollment in advanced courses should be based on student interest, career objective, and past performance. Information gained from courses such as business dynamics, business law, business economics, business management, business communications, and introduction to data processing may be beneficial to all students.

Suggestions for Administrators

The following suggestions are made for administrators regarding the relationship of guidance services to the business program:

- . Administrators should work with business teachers in planning the business schedule
- . All subjects should be taught by teachers competent in the area of instruction
- . Introduction to business and beginning typewriting should be open to all interested students
- . When enrolling students in shorthand, administrators should keep in mind that a good background in English, spelling, and vocabulary is required for stenographic occupations

- . Students enrolling in shorthand should have successfully completed beginning typewriting
- . Administrators, guidance counselors, business teachers, and students should confer regarding enrollment of students in advanced business courses
- . Duplicating, recordkeeping, and typewriting assignments, in connection with the operation of the school should be scheduled as learning activities for students. Such work should not be required as a school service beyond the learning stage
- . Administrators, guidance counselors, business teachers, students, parents, and prospective employers should confer regarding job placement and follow-up of graduates
- . Alternatives and options should be available in the business program in line with student and community needs

ROLES AND RESPONSIBILITIES OF BUSINESS TEACHERS

The effectiveness of business teachers in the classroom is partially dependent upon their professional attitudes and interests. Creative teaching is a mark of a professional business teacher. It begins with carefully planned objectives that define student growth and achievement in knowledges, skills, attitudes, and understandings from each assignment or unit of study. Although opportunities for innovative teaching vary somewhat in different communities, with different groups of students, and with different individuals, a business teacher who recognizes and fulfills professional obligations and responsibilities is more likely to also be creative and imaginative.

Upon completion of requirements for a baccalaureate degree, obtaining a valid teaching certificate, and the development of the personal and professional attributes necessary for teaching, an individual is ready to enter the profession. To be distinguished as a professional, a business teacher should (1) have high ethical standards; (2) establish and maintain good teaching-learning environments; (3) establish rapport with co-workers; (4) fulfill expectations of supervisors; (5) cultivate and promote good relations with the community; (6) continue educational growth through formal graduate programs, self-evaluation and improvement methods, reading professional books and periodicals, and actual work-related activities; and (7) participate and become involved in professional organizations, business and civic, in order to be aware of innovations, laws, and standards.

High Standards of Ethical Behavior

The professional business teacher maintains high standards of ethical behavior which include the following:

- . Recognition of and respect for each student as an individual
- . Respect for the confidences of students
- . Respect for the integrity of co-workers
- . Recognition of the difference in roles of teacher and student
- . Recognition of the importance of maintaining the best possible learning environment
- . Respect for, and adherence to, school regulations

Participation in Professional Organizations

The professional business educator will become an active member of local, state, and national professional organizations. Such membership will provide many publications that enable the teacher to keep

abreast of current research, industrial and occupational job competencies, and new methodology and teaching procedures. Since business education teachers should take an active part in the development of new programs, professional information about new developments in business education is of increasing importance to them. Specialized information provided by professional organizations can provide the assistance needed to bring about needed curriculum changes. The value received from professional magazines and research, coupled with in-service workshops, seminars, and conferences, adds a measure of professionalism obtained in no other way.

The professional business education organizations of particular interest to business teachers and prospective business teachers in North Carolina include the following:

National Business Education Association. This is the only national organization with total concern for, and interest in, business education and business teachers. NBEA conducts an annual national convention, publishes the Business Education Forum and the National Business Education Yearbook, and provides other services and materials for business teachers. The four divisions of NBEA are (1) International, (2) Research, (3) Teacher Education (NAVTE), and (4) Teaching, Supervision, and Administration.

Southern Business Education Association. This is one of the five regional associations of the National Business Education Association. North Carolina business educators who belong to NBEA also are members of SBEA, which holds an annual convention and publishes newsletters and service bulletins.

North Carolina Business Education Association. The state business education association has membership open to all business educators and college students enrolled in business teacher education programs. NCBEA holds an annual meeting and publishes a news bulletin.

American Vocational Association. This is the national organization for all vocational teachers and administrators. The Business and Office Education Division has a representative on the AVA Executive Board. AVA holds an annual convention and publishes the American Vocational Journal monthly.

North Carolina Vocational Association. The membership of this state vocational association is comprised of teachers, teacher educators, and administrators associated with vocational education programs. The Business and Office Education Division has a representative on the NCVA Executive Board.

Membership in honorary societies is available by invitation to undergraduate and graduate business education students.

Pi Omega Pi. This is an honor society in business education which promotes scholarship and a professional spirit at the undergraduate level. Membership is open by invitation to business education students in universities and colleges where active chapters are located.

Delta Pi Epsilon. This honorary graduate business education fraternity, with its invitational membership, promotes research in business education and publishes the Delta Pi Epsilon Journal as well as other occasional pronouncements.

Keeping up to Date through Professional Literature.

Professional literature should become a part of every professional business teachers' regular reading. In addition to the journals and yearbooks published professional organizations presented earlier in this section, some well-known professional journals for business educators are:

<u>Balance Sheet</u>	South-Western Publishing Company 5101 Madison Road Cincinnati, OH 45227	Free
<u>Business Education</u> <u>World</u>	Gregg Division, McGraw-Hill Book Co. 1221 Avenue of the Americas New York, NY 10020	Free
<u>Journal of Business</u> <u>Education</u>	Robert D. Trethaway 15 South Franklin Street Wilkes-Barre, PA 18701	\$5.50 per year
<u>Journal of Economic</u> <u>Education</u>	Joint Council on Economic Education 1212 Avenue of the Americas New York, NY 10020	\$3 per year

The professional business teacher should also be aware of the many free and nominal cost materials that can be obtained from business and industrial firms. Such professional associations as the Insurance Information Institute, American Bankers Association, and Credit Union National Association supply materials.

Obtaining In-Service Education

In-service education is essential for teachers to keep up to date with materials, equipment, and concepts in a rapidly changing business world. In-service education should include practical work experience as well as various types of programs designed to upgrade teaching competencies. Meaningful programs can be conducted in each school or in each area, either before the school year begins or during the school year. Local administrative agencies in the same district can cooperate in bringing together resource persons to present new equipment, materials, and concepts. To grow professionally, teachers must be willing to devote time to in-service education.

Working with Prospective Teachers.

An important responsibility of the professional business teacher is to serve as a model for the prospective business teacher. The guidance and leadership abilities shared may have a lasting effect on the student teacher's success as a classroom teacher.

Public Relations

The business teacher must utilize all facilities available for creating a close working relationship between the business classroom and the local business community. The use of news media, bulletin board displays, open house, and personal conferences with citizen advisory committees will improve public relations. Membership in local civic organizations is also beneficial in promoting good public relations. By actively participating insofar as possible in the business and professional organizations and activities of the community, the business teacher can keep the public informed about the work of the department, the types of preparation being offered, and the manner in which the business department serves the community. Suitable publicity should be given the work of the business department, as well as the achievement of its business students and graduates.

Youth Organization Adviser

Although one business teacher should be designated as FBLA adviser, each teacher in the business department should share the responsibility for making membership in an active FBLA chapter available to all business students. Areas of individual responsibility may be determined by mutual agreement, but the ultimate success of chapter activities will depend on the professional attitude and cooperation of all business teachers.

Advisory Committee

Professional business teachers will assume their share of the responsibility for organizing a business advisory committee and coordinating its activities. Such a committee can provide valuable input in the areas of program planning and evaluation as well as by working directly with student groups as resource persons.

FACILITIES AND EQUIPMENT

Introduction. The purpose of this material is to provide basic information which may serve as starting points for modernizing existing facilities or for planning new facilities to accommodate the Business and Office Education program.

Since the primary objective of the Business and Office Education program is to provide opportunities for students to develop occupational competencies, it is important that business teachers have space, equipment, supplies, and teaching materials to implement these programs. Since their responsibility includes assisting students in acquiring essential knowledge, developing necessary skills, and building proper attitudes toward work, they will need adequate physical facilities in which to teach.

The need for adequate and well-planned facilities becomes even more important for those utilizing the simulated plan of instruction as well as the cooperative and regular program plans. The simulated plan requires more space and specialized equipment for students to carry out project-type assignments.

It is recognized that Business and Office Education needs are not the same in all communities and that physical facilities cannot be the same if they are to meet these differing needs. After business educators have studied this section carefully, they will be able to better convey their respective program needs in terms of space and equipment to school boards, school administrators, architects, and other concerned persons.

The Business Education teacher should utilize a variety of teaching/learning activities. To assist in this process, it is desirable to have both the laboratory-classroom and the equipment specifically designed to meet these needs. While full realization of these needs may not be possible in all schools, it is the intention of this material to offer suggestions rather than specific examples.

Sources of Information. Even though personnel within a school system will provide helpful assistance with the planning process, external sources of information should be sought. A qualified architect can provide helpful suggestions relative to acoustics, light control, special electrical requirements, heating, and ventilation.

Professional journals are an excellent source of information concerning facilities and equipment. Also, school systems known to have good facilities may provide assistance. In addition, good use should be made of the planning resources of colleges and universities.

Before any of the suggestions given in this section are worked into preliminary plans, the Division of School Planning, Department of Public Instruction, Raleigh, should be consulted. This Division, as well as state staff for Business and Office Education, will supply additional information and assistance with the planning process.

While the enrollment of a school is a controlling factor in the development of an effective business program, other factors must be considered. To a large extent, the kind of community determines the size and type of a business education program. Some communities will require much greater provision for Business and Office Education departments than others due to a number of reasons - rapid growth, location near a large industrialized area, demand for highly specialized office personnel, outstanding school placement service, economic status, and location near a metropolitan area. It is important, therefore, that these and other factors be carefully reviewed in determining the type and scope of a school's business program, facilities, and equipment. Because of community variations, it is difficult to set exact standards for space, facilities, and equipment. Information given in this section is suggested rather than prescribed. Each school system should design facilities based primarily on community and student needs.

General and Specific Requirements. Certain general and specialized requirements are important aspects of planning a business department and should be considered before final decisions are made. These include use, change, flexibility, and arrangement.

Planning should be based on soundly determined uses of each Business Education classroom and laboratory, accepted principles of good teaching/learning, and program objectives.

The use of each business education classroom and laboratory should contribute to general and specific objectives that are accepted and clearly understood by the school board, administrators, and business teachers.

Planning for facilities and equipment should provide for change. The rate of technological progress has turned yesterday's imagination into reality for the modern business office. Classroom facilities must keep abreast of such progress. Attention should be given to fundamental revision of traditional methods of instruction--revision which will certainly affect classroom design.

Provision for flexibility in expansion and ease of alteration should be considered in all phases of program planning. The amount of floor space necessary to provide adequate work stations in rooms used for various specialized business courses should be determined by future enrollment, size of desks or tables to be used, room arrangement, and aisle space.

It is recommended that classrooms making up the Business Education suite or department be located in the same general area or adjoin.

General and Special Recommendations. General and special recommendations that should be considered in the planning process are:

Location

- . First floor is recommended for these reasons:
 1. Ease of equipment movement for installation, replacement, and repair.
 2. Vibration from typewriters and other business equipment.
 3. Near administrative offices.
 4. Accessibility for evening and summer classes.
- . Rooms for all business classes should be in the same area, functionally located and conveniently arranged.

Heating and Ventilation

- . Well heated and ventilated.
- . Air conditioned.

Acoustics

- . Acoustical treatment of ceiling, walls, and floor.

Lighting

- . Well-diffused light with minimum glare.
- . Provision for control of artificial and natural lighting through the use of shades, drapes, or a reostat.

Room Arrangement and Decor

- . Attractive through the use of color, furniture, and materials.
- . Atmosphere approximating actual business office conditions.

Electrical Wiring

- . Adequate outlets to accommodate electric equipment, plus proper voltage.
- . Floor conduits should be installed for future expansion.

Equipment

- . Selection of equipment brand(s) should be determined by:
 1. Availability of adequate service.
 2. Manufacturer's instructional materials.
 3. Life span relative to cost.

4. Relevance to business community.

- . Because of the high frequency of use of electric typewriters in the business office, all typewriting students should have opportunities to learn to use the electric typewriter.

Once the scope and sequence of the Business Education program have been determined, the room layout should be considered. It should be emphasized that grouping rooms to make up the Business Education suite is necessary for communication and proper utilization of space and equipment. For additional information on room layouts and equipment, designated persons should contact companies specializing in office furniture for diagrams and suggested layouts.

The following detailed information should be reviewed before planning Business Education facilities:

General Classroom (for courses not requiring business machines for student use)

- . Size: - 900 - 1,000 square feet; aisles, 2 - 3 feet
- . Furniture:
 - . Table-style desks
 - . Adjustable posture chairs
 - . Teacher's desk and chair
 - . File cabinets (two 4-drawer)
 - . Work table(s)
 - . Lectern
 - . Bookshelves with magazine rack
 - . Study carrels
 - . Coat rack with shelf for student use
- . Equipment:
 - . Overhead projector and screen
 - . Waste baskets
 - . Desk trays (for teacher's desk)
 - . Pencil sharpener
 - . Other equipment needed for various teaching techniques
- . Special Recommendations:
 - . Chalkboard (24 feet)

- . Bulletin boards (2)
- . Built-in counter with storage space and adjustable shelves
- . Electric outlets
- . Provision for darkening room
- . Acoustical treatment for ceiling, walls, and floor

Typewriting Laboratories (Beginning and Advanced)

- . Size: 900 - 1,400 square feet; aisles, 2 - 3 feet
- . Furniture:
 - . Student desks (L-shaped tables with electric leg recommended)
 - . Adjustable posture chairs with casters
 - . Teacher's desk and chair (high stool recommended if staff offices are provided)
 - . Bookshelves with magazine rack
 - . Coat rack with shelf for student use
- . Equipment:
 - . Manual typewriters (may be used for beginning typewriting)
 - . Electric typewriters (especially for advanced typewriting)
 - . Demonstration stand with typewriter
 - . Proportional-spacing typewriter
 - . Long-carriage typewriter
 - . Copyholders
 - . File cabinets (two 4-drawer)
 - . Staplers - regular and heavy duty
 - . Desk trays for teacher's desk
 - . Paper cutter
 - . Stop watch and timer
 - . Large waste baskets
 - . Overhead projector and screen
 - . Pencil sharpener

. Special Recommendations:

- . Master switch
- . Chalkboard (15 feet)
- . Bulletin boards (2)
- . Counter with storage below and adjustable shelves
- . Electrical outlets adequate in number to permit various room arrangements
- . Sink with soap tray and towel dispenser
- . Acoustical treatment of walls, ceiling, and floor

NOTE: When the typewriting laboratory is used for shorthand, wireless multiple-listening equipment should be included with other recommended equipment.

Shorthand Classroom/Laboratory

- . Size: 900 - 1,000 square feet; aisles, 2 - 3 feet
- . Furniture:
 - . L-shaped desks with electric leg
 - . Adjustable posture chairs with casters
 - . Teacher's desk and chair
 - . Combination lectern and overhead projector stand
 - . File cabinets (two 4-drawer)
 - . Coat rack with shelf for student use
- . Equipment:
 - . Electric typewriters
 - . Overhead projector and screen
 - . Tape recorder(s)
 - . Record player
 - . Electronic dictating/listening equipment with headphones
 - . Interval timer and stop watch
 - . Staplers
 - . Waste baskets

Pencil sharpener

- . Special Recommendations:
 - . Tote cart
 - . Built-in storage (for tapes, records, and books)
 - . Chalkboard (15 feet)
 - . Bulletin boards (2)
 - . Master switch and sufficient electric outlets

Accounting Classroom/Laboratory

- . Size: 900 - 1,200 square feet; aisles, 2 - 3 feet
- . Furniture:
 - . Student tables (24" x 36")
 - . Adjustable posture chairs with casters
 - . Work table
 - . Teacher's desk and chair
 - . Lectern (adjustable)
 - . Bookshelves with magazine rack
 - . Coat rack with shelf for student use
- . Equipment:
 - . Ten-key adding and electronic calculating machines (one for each five students)
 - . File cabinets (two 4-drawer - one with lock)
 - . Pencil sharpener
 - . Large waste baskets
 - . Staplers
 - . Desk trays for teacher's desk
 - . Overhead projector and screen
- . Special Recommendations:
 - . Acoustical treatment of walls, ceiling, and floor
 - . Master switch

- . Adequate electric outlets to accommodate adding and electronic calculating machines and to permit various room arrangements.
- . Chalkboard, (20 feet; one section ruled with permanent forms)
- . Bulletin boards (2)
- . Provision for wall charts
- . Built-in counter-top storage for equipment and teaching materials

Office Occupations Laboratory

- . Size: 1,000 - 1,400 square feet or approximately 40 square feet for each work station
- . Furniture:
 - . L-shaped desks (right- and left-hand with electric leg)
 - . Adjustable posture chairs with casters
 - . Receptionist's desk and posture chair
 - . File cabinets (two 2-drawer and two 4-drawer)
 - . Stencil file cabinet
 - . Work table, 30" x 60"
 - . Combination demonstration stand and lectern (adjustable)
 - . Coat rack and shelf for student use
 - . Teacher's desk and chair (may be housed in model office as office manager's desk)
- . Equipment:
 - . Electric typewriters
 - . Proportional-spacing typewriter
 - . Long-carriage typewriter
 - . Ten-key adding machines
 - . Electronic calculators (printing and display)
 - . Reprographic equipment (photo, fluid, stencil, offset)
 - . Mimeoscope with styli, lettering guides, and screen plates
 - . Collator
 - . Folding machine

- . Copyholders
- . Paper cutter
- . Waste baskets (large and small)
- . Staplers (regular and heavy duty)
- . Scissors
- . Overhead projector and screen
- . Special Recommendations
 - . Chalkboard (15 feet)
 - . Bulletin boards (2)
 - . Acoustical treatment of walls, ceiling, and floor
 - . Lavatory facilities (sink, soap tray, and towel dispenser)
 - . Full-length mirror
 - . Master switch
 - . Sufficient electrical outlets to permit various room arrangements

Resource Center

- . Size: 10' x 15'
- . Furniture:
 - . Table - conference-type to seat 6 or 8
 - . Chairs
 - . Study carrels
 - . Bookshelves
 - . Wall magazine rack
 - . File cabinets (two 4-drawer)
 - . Small bulletin board
- . Equipment:
 - . Tape recorders (minimum of 2)
 - . Film projectors
 - . Film loop projectors

- . Strip film projectors
- . Waste baskets
- . Pencil sharpener
- . Special Recommendations:
 - . Acoustical treatment of walls, ceiling, and floor
 - . Built-in storage for tapes and other materials
 - . Small bulletin board
 - . Placed in center of suite or connected to Business Education classrooms

Staff Office

- . Size : 15' x 15'
- . Furniture:
 - . Typing table
 - . Posture chair with casters
 - . Teachers' desks and chairs
 - . File cabinets (4-drawer, lock-type)
- . Equipment:
 - . Electric typewriter
 - . Waste baskets
 - . Tote cart (for moving equipment)
 - . Pencil sharpener
 - . Telephone

Data Processing Laboratories

- . Size: Classroom, 30' x 36'
Laboratory, 30' x 15'
NOTE: The size and number of rooms determined by the scope of the data processing program
- . Furniture:
 - . Student tables (3' x 6')
 - . Adjustable posture chairs

- . Teacher's desk and chair
- . Machine tables (2' x 3')
- . Card files (2' x 2 1/2')
- . Demonstration table
- . Storage cabinets (2' x 4')
- . File cabinets (legal size, 4-drawer)
- . Equipment: (May be rented or purchased)
 - . Overhead projector and screen
 - . Filmstrip projector
 - . Data entry machines
 - . Simulation typewriters
 - . Tape recorder or cassette
 - . Computer terminal
 - . Chalkboard and bulletin board
- . Special Recommendations:
 - . Adequate voltage
 - . Climate control provision
 - . Storage area for materials

Model Office (May be a section of the Office Occupations Lab)

- . Size: 900 - 1400 square feet
- . Furniture
 - . Receptionist's desk and adjustable posture chair
 - . File cabinet (2-drawer for receptionist)
 - . Mail clerk's desk and adjustable posture chair
 - . File cabinet for mail clerk (4-drawer)
 - . Manager's desk and chair
 - . Small conference table and 6 - 8 chairs
 - . Typist/secretarial desks with posture chairs

- . Equipment:

- . Electric typewriters
- . Adding machines (10-key preferred)
- . Electronic calculators (display and printing)
- . Copyholders
- . Interoffice communications system (for training purposes)
- . Wastebaskets
- . Dictating/transcribing equipment
- . Reprographics equipment (photo, fluid, stencil, offset)

- . Special Recommendations:

- . Built-in cabinets for storage
- . Room dividers (portable)
- . Sufficient electrical outlets to permit various room arrangements
- . Carpet
- . Telephone jacks
- . Other furniture and equipment, depending on size of office and size of simulated company operations

YOUTH ORGANIZATIONS

Future Business Leaders of America

Making the business and office curriculum come alive is the dream of every dedicated business teacher. Getting involved in a youth organization for business students can make this happen through the excitement of practical experience, friendly competition, and active participation in projects and activities which contribute to individual student growth and instill a sense of civic responsibility.

Future Business Leaders of America (FBLA) is the national organization for all high school students participating in business and office education programs. Designed to function as an integral part of the instructional program, FBLA provides additional opportunities for secondary students (grades 9-12) in business and office education programs to develop vocational and career supportive competencies and promotes civic and personal responsibility. Phi Beta Lambda (PBL) is the post-secondary division of FBLA-PBL, Inc.

The FBLA program of activities can complement, supplement, enrich, and strengthen the instructional program of Business and Office Education. It provides a method for the enrichment of the business and office instructional program through competitive events and activities planned by students under the guidance and direction of the adviser.

FBLA members learn how to lead and participate in group discussions, preside at meetings, work effectively within committees, and engage in practical problem-solving and decision-making. They learn the value of competition on local, district, regional, and national levels by experiencing the responsibility of success as well as the challenge of defeat. Through contact with teachers, advisers, employers, and interested business persons, FBLA members develop confidence in their own abilities and learn that to develop them to their fullest is a personal responsibility as well as an organizational goal.

Participation in civic projects, sales projects, social awareness projects, and career development projects, as well as personal experiences related to business and the profession, can stimulate interest and the self-motivation needed for students to succeed in school and beyond. Many FBLA activities provide learning situations which can improve knowledge, increase skills, and shape attitudes that will advance the students' business career.

FBLA provides a natural avenue for a teacher to recognize individual and/or group achievement. An active chapter, properly utilized, can bring community, state, and national recognition to members, their adviser, and their school. In addition to a sense of accomplishment, the business/office teacher will find that the teaching load becomes lighter, because the student-members are the "doers" with the teacher serving as the "adviser" in a counseling and guidance role.

The success of an FBLA chapter hinges on many factors, but the most important one is the chapter adviser. No organization can move forward without the proper guidance of a dynamic and dedicated leader. Thus, an adviser should be a good planner and organizer and a capable leader. The adviser must display integrity, perseverance, and initiative in professional and daily activities.

Being a chapter adviser is not a responsibility to be taken lightly; on the other hand, it is not to be feared and dreaded. It is to be understood, worked at, and enjoyed. Qualities such as stamina, vitality, enthusiasm, insight, initiative, patience, a superb sense of humor, professionalism, adaptability, confidence, a very thick skin, and a genuine liking of young people and respect for their ideas are essential if an adviser is to be successful.

Realizing the importance of the teacher's role, FBLA provides the opportunity to do the complete teaching. One way to best implement FBLA is to bring it into the classroom, with some meetings and projects planned and organized as part of the instructional program.

The Goals of FBLA

The goals of FBLA are to

- . Develop competent, aggressive business leadership
- . Strengthen the confidence of students in themselves and their work
- . Create more interest in and understanding of American business enterprise
- . Encourage members in the development of individual projects which contribute to the improvement of home, business, and community
- . Develop character, prepare for useful citizenship, and foster patriotism
- . Encourage and practice efficient money management
- . Encourage scholarship and promote school loyalty
- . Assist students in the establishment of occupational goals
- . Facilitate the transition from school to work

Structure and Organization

Future Business Leaders of America-Phi Beta Lambda, Inc., is a nonprofit student vocational education organization composed of two divisions - FBLA at the high school level and Phi Beta Lambda at the postsecondary and college level. Most local chapters are under the supervision of a state chapter, and all work within the framework of the national organization. Members of the business faculty serve as advisers to local chapters and are assisted by advisory committees composed of school officials, business persons, and other representatives from the community.

Local and state chapters of FBLA and PBL operate under charters granted by FBLA-PBL, Inc. Each chapter, with its own constitution, adopts projects and programs within the framework of the national organization.

The FBLA-PBL plan of organization includes local chapters, state chapters, and the FBLA-PBL national organization.

Local chapters consist of students enrolled in business programs, organized and officially chartered in accordance with the guiding principles of FBLA-PBL, Inc.

State chapters are composed of local chapters within the state and operate under charters granted by FBLA-PBL, Inc. The North Carolina Charter was issued on April 15, 1954. Delegates representing local chapters meet at least once a year to plan state chapter activities, transact the business of the state chapter, and review the program of work carried on by the organization.

The national organization is composed of all local and state chapters and each FBLA and PBL member. Officers of the national organization are elected each year at the annual National Leadership Conference. A national Executive Council for both FBLA and PBL is composed of elected national officers, their state advisers, and the ex officio nonvoting members of FBLA-PBL, Inc.

Financial Structure

FBLA-PBL is financed primarily through individual memberships in local chapters. Membership dues are paid through the local chapter. Some chapters, acting as a unit for the members, pay the national and/or state membership dues from funds derived from income-producing chapter projects. FBLA national dues are \$1.50 per member; FBLA state dues in North Carolina are also \$1.50 per member. Income from national and state dues is used exclusively for services to local and state chapters. Memberships on the local, state, and national levels are unified and are not available separately.

FBLA-PBL, Inc., is on the approved list of the National Association of Secondary School Principals.

How to Organize a Chapter

A chapter of FBLA should be the result of a cooperative effort on the part of the business students and the business faculty. There is no substitute for real enthusiasm on the part of all concerned. A sincere desire to be of service to one's co-workers, classmates, school, and community and to prepare for the acceptance of great responsibility and challenge form a background for organizing and operating a chapter of FBLA.

An information packet has been prepared to assist business teachers in organizing a local chapter and applying for a charter. This packet contains facts about the organization, recruitment of members, promotion ideas, a sample constitution, and an application for a charter. No local chapter can use the name or emblem of FBLA without securing a charter from the national office.

After a chapter has received a charter, official handbooks will be mailed from both the National and State chapters. These handbooks give many helpful suggestions on chapter operation and activities, as well as guidelines for competitive events.

North Carolina FBLA issues a special invitation to North Carolina business teachers to become involved, along with their students, in this student organization designed especially to provide leadership development for all business students. To obtain the information packet, please write to the following address:

FBLA-PBL State Chairman
Business and Office Education
State Department of Public Instruction
Raleigh, NC 27611

Responsibilities of the Chapter Adviser

Primary responsibilities of the chapter adviser are to:

- . Initiate the organization of the FBLA chapter.
- . Become thoroughly versed in the history, principles, constitutional provisions, ceremonies, typical activities, parliamentary procedures, and other essentials of the organization.
- . Assist in the plans for insuring an efficient group of officers by setting up criteria and letting candidates know the responsibilities of each office.
- . Instruct newly elected officers concerning their duties and provide all members with opportunities for leadership development.
- . Assist members in planning a calendar of events. Set dates of events early in the school year and place them on the school calendar early.
- . Plan programs that are adequately financed and insure that funds are properly protected. Help set up organization records and accounts.
- . Hold chapter meetings regularly and have them conducted in a business-like manner.
- . Help new members become involved in FBLA activities and promote active participation of all members.
- . Encourage the procurement of necessary chapter equipment and office supplies.
- . Inform the national and state offices of chapter activities.
- . Assist officers when necessary with chapter business.
- . Counsel individual members and committees on problem and activities.
- . Encourage participation in district, state, regional, and national conferences.
- . Help students prepare for leadership activities and participation at all levels of competition.
- . Have all ceremonies, public performances, and displays carefully planned and implemented.
- . Inform school administrators, faculty, and the public of chapter activities and developments.
- . Encourage and help provide avenues for parental and advisory committee involvement.
- . Keep members abreast of new developments in FBLA.
- . Promote FBLA as an active co-curricular student organization.

Policy Statement - U. S. Office of Education

In September, 1974, an important policy statement on vocational student organizations was issued by the U. S. Office of Education. This statement lists FBLA-PBL as one of the six vocational education youth organizations which are recognized as "an integral part of our vocational education system of training." After recognizing that the past performance and demonstrated potential of these six organizations are compatible with the overall purposes and objectives of education today, the U. S. Office of Education further endorsed their objectives and asked for their involvement in the development of future policies and plans.

This exciting policy statement enhances the possibility for accelerated growth and support for all six organizations. One of the four segments of

the statement reads as follows:

The United States Office of Education will provide technical and supportive services to assist vocational student organizations and state agencies in their efforts to improve the quality and relevance of instruction, develop student leadership, enhance citizenship responsibilities, and provide wholesome experiences for youth.

Policy Statement - National Advisory Council on Vocational Education

According to the National Advisory Council on Vocational Education,¹ our vocational student organizations are quietly doing more to close the relevance gap between what business and industry need and what education is producing than any other movement on the educational scene. These organizations accomplish this through direct, daily involvement of business and industry in the educational process.

NACVE, in its 7th Report, recommended that the President of the United States, Congress, and the USOE give to these organizations visibility, recognition, and support, and further challenged the student organizations themselves to "... launch a massive campaign with financial and professional assistance from the U. S. Office of Education, to take their story to every local district, every state board, every teacher group, every state legislature, the U. S. Congress, and to the general public."

The 7th Report further states:

The work of these organizations is integral to career education. They are by no means a frivolous and optional extra-curricular activity. Students are deeply involved at every stage. The organizations provide indispensable emphasis on career and civic awareness, social competence and leadership ability. Few who have witnessed the work of these organizations at first hand question their value as essential instruments in career education. Their activities are characterized by a contagious kind of zest and enthusiasm all too rare in educational endeavors.

Policy Statement - North Carolina Board of Education

In February, 1972, just prior to the publication of the NACVE 7th Report, the North Carolina Board of Education made public its philosophy with respect to youth organizations for students enrolled in occupational education programs by adopting the following statement of policy:

Youth organizations shall be organized as integral part of occupational education instructional programs in public schools to complement and enrich instruction. Local plans for occupational education shall contain adequate provision for the support of each youth organization affiliated with the occupational education programs offered in each school.

¹7th Report, "Vocational Student Organizations," National Advisory Council on Vocational Education, November 15, 1972

²Ibid., pp. 5-6

³Ibid., pp. 3

Under this policy, all occupational education teachers are encouraged to assume some responsibility for planning and implementing youth organization activities. Also, local education agencies are expected to provide appropriate preservice and inservice education programs to assist teachers in the effective performance of their duties and responsibilities in youth organizations. In addition, the continuous, systematic evaluation of youth organizations is expected to be a part of program evaluation.

Section X
COURSE GUIDES

SDPI NO.: 6332 COURSE TITLE: Accounting I O. E. CODE: 14.0100

COURSE DESCRIPTION (Semester 1): This course provides an understanding of the basic principles of the accounting cycle from the analysis and recording of business transactions to the preparation and interpretation of financial statements and supporting data. Adding and/or calculating machines should be available for student use.

LEVEL: Grades 10, 11, 12 CREDIT: 1 Unit LENGTH: 2 Semesters

PREREQUISITES: Business Math or pretest equivalency

OBJECTIVES: At the end of study in Accounting I, semester 1, the student will:

1. Explain the need for accounting in business, industry, and government
2. Identify and explain accounting terms
3. State and explain the fundamental accounting equation
4. Explain the "why" as well as the "how" of accounting procedures
5. Analyze and interpret various business transactions using accounting terminology
6. Operate by the touch system an adding machine and/or a calculator in solving accounting problems
7. Describe each phase of the accounting cycle and its relationship to the total process
8. Apply and complete the procedures in the accounting cycle
9. Interpret and analyze simple financial statements
10. Interpret and analyze business papers and records used in the local business community
11. Identify source documents and record these documents in a double-entry set of books
12. Prepare business forms, including checks, deposits, and bank reconciliation statements
13. Demonstrate desirable personal traits necessary in the accounting area

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Introduction	
a. Purpose and value of accounting records	. Discuss why a business needs to keep accurate accounting records.
b. Starting an accounting system	. Discuss how keeping accurate accounting records helps maintain ownership.
c. Types of business ownership	. Study examples of single proprietorship, partnership, and corporation in local community
d. Career opportunities in accounting	
e. Terminology and practices	. Use resource speaker on career opportunities.

OutlineActivities

- | | |
|--|---|
| <ul style="list-style-type: none"> f. Accounting equation g. Balance sheet | <ul style="list-style-type: none"> . Using local newspaper(s), review job opportunities in the accounting profession. |
| <ul style="list-style-type: none"> 2. Simple Accounting Cycle <ul style="list-style-type: none"> a. Journalizing <ul style="list-style-type: none"> (1) Opening entry (2) Transactions involving changes in assets, liabilities, and capital (3) Transactions involving changes in income and expenses b. Posting <ul style="list-style-type: none"> (1) Ledger (account balances) (2) Correcting entries c. Trial balance d. Work sheet e. Financial statements <ul style="list-style-type: none"> (1) Income statement (2) Balance sheet f. Closing the ledger g. Post-closing trial balance | <ul style="list-style-type: none"> . Define and learn the use of common accounting terms. . List items owned and owed and relate them to the accounting equation. . Use visual aids in presenting business forms. . Discuss and practice the step-by-step process of preparing a balance sheet. . Practice the application of machine skill in performing the computations necessary in completing the accounting cycle and preparing the financial statements. . Use visual aids in presenting accounting procedures. |
| <ul style="list-style-type: none"> 3. Accounting Cycle with Combination Journal and Subsidiary Ledgers <ul style="list-style-type: none"> a. Journalizing <ul style="list-style-type: none"> (1) Purchases of merchandise and cash payments on account (2) Sales and cash receipts (3) Other transactions b. Totaling and proving combination journal c. Ledgers <ul style="list-style-type: none"> (1) Subsidiary (2) General d. Schedules of accounts receivable and payable e. Checking account <ul style="list-style-type: none"> (1) Opening account (2) Writing checks (3) Reconciling bank statement (4) Related journal entries | <ul style="list-style-type: none"> . Using the T-account, analyze and record transactions involving the basic principles of the accounting cycle. . Solve sample problems, involving working papers, related to the steps in the simple accounting cycle. . Through the use of teacher-prepared problems containing errors, practice error detection and correction. . Discuss the kind of proof that is provided by a trial balance. . Complete a project, such as a practice set, involving the complete simple accounting cycle. . Use visual aids in presenting business forms and accounting procedures related to the combination journal and subsidiary ledgers. |

Outline

- f. Work sheet with adjustments
- g. Financial statements
 - (1) Income statement
 - (2) Capital statement
 - (3) Balance sheet
- h. Income tax reports
- i. Adjusting and closing entries
- j. Closing and balancing the general ledger
- k. Post-closing trial balance

Activities

- . Through a simulated exercise, practice the handling of a checking account from opening the account to reconciling the bank statement.
- . Solve sample problems, involving working papers, related to the steps in the accounting cycle with combination journal and subsidiary ledgers.
- . Using information from the annual income statement, prepare Schedules C and C-1, IRS Form 1040.
- . Complete a project, such as a business simulation or practice set, involving the accounting cycle using combination journal and subsidiary ledgers.

Accounting I Semester 2

COURSE DESCRIPTION: This course is a continuation of the study of the basic principles of the accounting cycle, including an introduction to flow charts and systems. Instruction emphasizes the "why" as well as the "how." Attention is given to payroll, taxes, data processing, special business transactions, and the basic types of business ownership. Adding and/or calculating machines should be available for student use.
PREREQUISITE: Accounting I, Semester 1

OBJECTIVES: At the end of study in Accounting I, semester 2, the student will:

1. Prepare payroll records, including time cards, payroll registers, and employees' earnings records
2. Prepare a payroll and record the entries in a journal
3. Prepare simple income tax reports
4. Review governmental regulations affecting financial reports
5. Describe the functions of data processing equipment as applied to accounting
6. Compare the three data processing procedures used to process accounting data
7. Correlate the use of special journals and identify the kinds of transactions related to each journal
8. Apply the procedures used in special accounting transactions.
9. Explain the basic differences in accounting for a single proprietorship, a partnership, and a corporation
10. Specify the accounting applications peculiar to the three basic types of business ownership.
11. Demonstrate desirable personal traits necessary in the accounting area.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Payroll Systems and Personal Income Tax	Secure Social Security pamphlets from the local Social Security office or from the U. S. Department of Labor to study Social Security benefits and current laws.
a. Payroll records	
(1) Payroll taxes	
(2) Preparing a payroll	
(3) Paying a payroll	Apply for a Social Security number.
b. Payroll accounts, taxes, and reports	Fill in W-4 and W-4E forms.
(1) Recording the payroll	
(2) Recording employer's payroll taxes	Compute hours, rate, and earnings on time cards.
(3) Paying withholding taxes and payroll taxes	Use Social Security Employee Tax Table and Withholding Tax Tables in computing deductions for each employee.

<u>Outline</u>	<u>Activities</u>
c. Understanding taxes (1) Purpose of taxes (2) Form 1040	. Prepare a payroll register, using adding and/or calculating machine in performing computations.
2. Introduction to Data Processing a. Manual and mechanical systems b. Unit record system c. Electronic computer	. Prepare an employee's earnings record. . Prepare checks for the completed payroll register. . Record the payroll in the combination journal.
3. The Accounting Cycle Using Special Journals a. Purchases b. Cash payments c. Sales d. Cash receipts e. Multi-column general journal f. Special problems related to sales and purchases	. Record the employer's payroll taxes in the combination journal. . Pay the withholding taxes and the payroll taxes. . Prepare payroll tax reports.
4. Special Accounting Transactions a. Cash register system b. Petty cash c. Sales tax and other sales and purchases systems d. Bad debts and valuation of accounts receivable e. Fixed assets and depreciation f. Disposing of fixed assets g. Notes and interest h. Accrued income and accrued expenses	. Discuss the processing of data using manual, mechanical, and electronic devices. . Visit business firms that use computers for processing accounting data. . Give oral and/or written reports on the various systems for processing data. . Identify and define accounting terms. . Calculate net amount based on terms of sale.
5. Accounting for Different Types of Ownership a. Partnerships b. Corporations	. Analyze the recording of transactions affecting purchases and cash payments. . Journalize and post transactions affecting purchases and cash payments . Analyze the recording of transactions affecting sales and cash receipts.

Activities

- . Analyze the recording of transactions in special journals.
- . Journalize and post transactions affecting sales and cash receipts.
- . Record correcting entry for a posting error in four-column general journal.
- . Make adjusting and closing entries including cash discounts and returns and allowances.
- . Complete a project that involves the accounting cycle using special journals.
- . Establish, prove, and replenish a petty cash fund for a merchandising business.
- . Record transactions in a cash register system.
- . Analyze and record sales tax on charge sales and on cash sales.
- . Record a receipt of cash for a charge sale including sales tax.
- . Analyze and record the payment of sales tax collected.
- . Record sales tax on sales returns and allowances.
- . Record a correcting entry involving sales tax.
- . Using sales invoices as a sales journal and as an accounts receivable ledger, record entry in a general journal and prepare a schedule of accounts receivable.
- . Compute bad debts expense and record transactions in the columnar journal.
- . Write off and post an uncollectible account.

Activities

- . Make adjustments on work sheet for work at end of fiscal period for bad debts and valuation of accounts receivable.
- . Record the purchase of fixed assets.
- . Determine the amount of depreciation expense.
- . Analyze and record adjustments on the work sheet for estimated depreciation.
- . Report fixed assets and depreciation on financial statements.
- . Calculate gain or loss on disposal of fixed assets.
- . Record transactions involving buying and disposing of fixed assets.
- . Complete work at end of fiscal period involving fixed assets.
- . Compute maturity dates and interest on notes receivable.
- . Compute bank discounts and proceeds on notes payable.
- . Record notes, interest, and bank discounts.
- . Record adjusting, closing, and reversing entries for accrued income and accrued expenses.
- . Prepare income statement, capital statement, and balance sheet.
- . Compute distribution of net income or net loss to partners.
- . Record opening entries for cash investments and other assets in a partnership.
- . Prepare distribution of net income statement, capital statement, and balance sheet.

Activities

- . Figure total amount each partner receives from the business for the fiscal year, including salary and share of net income.
- . Record opening entries to incorporate an existing business.
- . Declare and pay a dividend.
- . Prepare end-of-year work for a corporation from selected account balances in the general ledger, including work sheet, income statement, balance sheet, and adjusting, closing, and reversing entries.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A few of these methods include the following:

1. Printed tests correlated with the textbook
2. Standardized tests with no reference to a particular text
3. Teacher-made short-answer, essay, and problem-solving tests
4. Problems completed in class and out of class
5. Evaluation of classroom participation, homework, and attitudes
6. Evaluation of promptness, neatness, accuracy, and legibility of assigned work
7. Business simulations and projects
8. Interpretation of data contained in financial reports

INSTRUCTIONAL MEDIA: The media may include current accounting textbooks, supplementary accounting books, pamphlets, working papers, transparencies, films, filmstrips, cassettes, accounting charts and posters, accounting dictionaries, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include guest speakers, practice sets, field trips, business simulations, self-paced instruction, buddy system, learning activity packages, and teacher and student demonstration. See also pages 33-34 of this guide.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6333 COURSE TITLE: Accounting II O. E. CODE: 14.0100

COURSE DESCRIPTION (Semester 1): This course further acquaints the student with the use of business papers, forms, and reports involved in keeping financial records. It also develops skills in analyzing and interpreting information concerning business problems common to partnerships, preparing formal statements and supporting schedules, using voucher systems and coding, and using inventory control and budgetary control systems. Adding and/or calculating machines should be available for student use.

LEVEL: Grades 11 and 12 CREDIT: 1 Unit LENGTH: 2 Semesters

PREREQUISITE: Accounting I

OBJECTIVES: At the end of study in Accounting II, semester 1, the student will:

1. Analyze and interpret the basic accounting procedures, including the recording, summarizing, and reporting phases.
2. Demonstrate the use of departmental records and the preparation of departmental reports.
3. Update accounts by adjustments.
4. Demonstrate the use of partnership accounting and the preparation of the end-of-fiscal-period work for a partnership.
5. Apply the procedures of accounting control systems using the voucher, inventory control, and budgetary control systems.
6. Initiate and keep a double-entry set of books on an entry-level job within the performance requirements of the business firm.
7. Demonstrate desirable business attitudes and work habits needed in business.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Review of Basic Accounting Fundamentals	Complete a review project that involves processing and reporting business data.
a. Recording	
b. Summarizing and Reporting	Discuss the effect each department has on the profit or loss of the business.
2. Departmental and Payroll Accounting	
a. Departmental purchases and cash payments	Practice verifying all computations on purchase orders.
b. Departmental sales and cash receipts	Journalize and post purchases on account and purchases returns and allowances for a departmental business.
c. Payroll accounting	Record the cash payments of a departmental business.

Outline

3. Adjustments
 - a. Bad debts
 - b. Depreciation and depletion of fixed assets
 - c. Prepaid and accrued expenses
 - d. Income received in advance and accrued income
4. Partnership Accounting
 - a. Forming a partnership
 - b. Dividing partnership earnings
 - c. End-of-fiscal-period work
5. Control Accounting
 - a. Voucher system
 - b. Inventory control system
 - c. Budgetary control system

Activities

- . Practice verifying all computations on sales invoices.
- . Journalize and post sales of a departmental business.
- . Prepare departmental statements of gross profit.
- . Compute and prepare a payroll register using time cards and record the payroll entries.
- . Post data from payroll register to employee's earnings record and write payroll checks (illustrating the "write-it-once" principle).
- . Complete a project related to departmental and/or payroll accounting.
- . Record and post bad debts transactions using the allowance and direct write-off methods to show the difference between the two methods.
- . Estimate bad debts expense by aging accounts receivable.
- . Calculate depreciation expense by the straight-line, declining-balance, and sum-of-the-year-digits methods.
- . Record depreciation in a fixed assets register, cash payments journal, and general journal.
- . Record entries for disposing of fixed assets.
- . Record adjusting, closing, and reversing entries for prepaid and accrued expenses and for accrued income.

OutlineActivities

- . Record adjusting and closing entries for income received in advance and recorded as liabilities.
- . Record adjusting and closing entries for income received in advance and recorded as income.
- . Complete a project or business simulation involving updating accounts by adjustments.
- . Study and discuss the legal aspects of a partnership and the advantages and disadvantages.
- . Use a resource speaker from a local business firm operated as a partnership.
- . Record opening entries for a partnership when assets and liabilities are invested by one partner and cash by the other partner.
- . Record entry for admission of a partner with no increase in capital.
- . Record opening entries for investments of three partners.
- . Record and report the division of net income or loss by:
 1. interest on capital investments
 2. ratio of capital investments
 3. salary allowance
- . Prepare an income statement for a partnership.
- . Prepare a distribution of net income statement.
- . Complete a business simulation involving partnership and departmental accounting.
- . Record transactions in a voucher system and a check register.
- . Complete a project that involves a voucher system for control accounting.

OutlineActivities

- . Price an inventory on the basis of cost or market price, whichever is lower.
- . Price an inventory using the lifo and fifo methods.
- . Estimate the amount of inventory using the retail method.
- . Estimate the value of merchandise destroyed by fire.
- . Prepare a sales budget and a purchases budget.
- . Prepare an income and expense budget.
- . Prepare a summary cash budget.
- . Complete a project that involves inventory control systems and/or budgetary control systems.
- . Explore through quest learning the accounting applications and procedures used in the local business community.
- . Participate in setting up a set of books for FBLA, the school store, the school newspaper, the school annual, or other school organization.
- . Gain work experience in a business office or in the school bank.

Accounting II Semester 2

COURSE DESCRIPTION (Semester 2): This course provides the student with an opportunity to develop in-depth knowledge of accounting procedures and techniques utilized in solving business problems and making financial decisions. It also provides the student an opportunity to analyze managerial problems using accounting information as a tool. Greater emphasis is given to analysis, interpretation, and synthesis. Adding and/or calculating machines should be available for student use.

PREREQUISITE: Accounting II, semester 1

OBJECTIVES: At the end of study in Accounting II, the student will:

1. Apply accounting procedures to taxes, notes, and drafts.
2. Describe the major advantages and disadvantages of a corporation.
3. Analyze and interpret corporate financial reports.
4. Apply data processing principles to accounting procedures.
5. Discuss the significance of data processing to the field of accounting.
6. Explain and demonstrate a cost accounting system.
7. Compare daily decisions and infrequent decisions that affect income.
8. Use decision-making skills to solve management problems.
9. Demonstrate desirable personal traits, work habits, and business attitudes necessary for entry-level employment in the accounting field.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Accounting for Taxes, Notes, and Drafts	
a. Taxes on sales, property, and business income	. Record sales tax transactions in a sales journal and in a sales returns and allowances journal.
b. Notes receivable	. Record transactions in a columnar cash receipts journal.
c. Notes payable, drafts, and trade acceptances	. Record property tax.
2. Corporation Accounting	
a. Formation of a corporation	. Compute and record sales tax and cash discount.
b. Transactions for corporate stocks and bonds	. Record transactions with notes receivable.
c. Corporate financial reports	. Compute maturity dates, discount, and cash received from notes receivable.

<u>Outline</u>	<u>Activities</u>
3. Automated Accounting Systems a. General ledger b. Subsystems	- Record notes payable, drafts, and trade acceptances. - Discuss the legal aspects, advantages, and disadvantages of a corporation.
4. Cost Accounting a. Cost accounting for service departments b. Cost accounting for manufacturing c. End-of-fiscal-period work for a manufacturing business	- Use a resource speaker from a local corporation. - Review annual reports from several corporations.
5. Special Problems in Sales Accounting a. Installment Sales and credit card sales b. COD sales c. Consignment sales	- Study stock market listings in local newspaper and follow for several days to identify trends. Discuss effects of these trends on national and international economy. - Calculate the dividends of a corporation.
6. Management Use of Accounting Data a. Analyzing financial statements b. Statement of changes in financial position c. Management decision making	- Compute the division of net income or net loss of a corporation for a seven-year period. - Record entry necessary for dividends payable.
7. Internship For those students who can benefit from it, internship provides opportunity for observation of accounting functions in a business establishment. Site, length, and activities will be determined jointly by teacher, principal, student, and business person based on student needs, schedule, and career objective.	- Record transactions for sale and transfer of capital stock. - Keep stock transfer books. - Record in correct journals transactions for corporate bonds payable. - Record transactions for sale of common and preferred stocks. - Prepare a worksheet for a corporation and compare it with that of a partnership. - Prepare an income statement and a capital statement for a corporation.

OutlineActivities

- . Record the adjusting and closing entries for a corporation.
- . Complete a business simulation involving corporation accounting.
- . Compare and contrast the manual and the automated accounting cycles.
- . Design a coding system for an automated general ledger accounting system.
- . Prepare a transaction transmittal form.
- . Prepare an accounts receivable control sheet.
- . Prepare a systems flow chart for the processing of daily accounts payable transaction register for a wholesale business.
- . Prepare job order sheets for a service business.
- . Prepare a schedule of gross profit by departments for a service business.
- . Record auto sales and service transactions.
- . Prepare a cost sheet for a manufacturing business, computing factory overhead at a given rate of direct labor cost.
- . Record in a voucher system selected transactions for a manufacturing business; foot, prove, total, and rule the voucher register.
- . Journalize the entries that summarize the cost records at the end of the month.
- . Prepare a statement of cost of goods manufactured.

OutlineActivities

- . Complete a business simulation of a manufacturing business that uses a job-order cost system.
- . Record selected transactions with cash sales, charge sales, and installment sales in the proper journals.
- . Post to the installment accounts and the general ledger accounts from the above journal entries.
- . Record transactions for bank credit card sales in a cash receipts journal.
- . Record transactions involving COD sales by indicating the accounts to be debited and credited and the amounts for each transaction in general journal form.
- . Record entry to charge customer's account for transportation charges on returned COD shipment.
- . Record selected consignment transactions completed during one month of a fiscal year, using a consignment record for each consignment.
- . Prepare a comparative balance sheet and income statement for two given years.
- . Analyze a comparative balance sheet and compute for each year the following ratios: current, acid-test, equity, and ratio of current assets to fixed assets.
- . Analyze a comparative income statement and compute for each year the percentage of net sales in: cost of merchandise sold, gross profit on sales, total operating expenses, and net income after federal income tax, indicating if there appears to be a favorable or unfavorable change between the two years and discuss reason for change.

OutlineActivities

- . Analyze the data on a comparative balance sheet and income statement and compute the rate of return on the owner's capital for both years. Based on computations made, indicate if the trend from one year to the next for the rate of return on owner's capital appears to be favorable or unfavorable. Justify.
- . Prepare a statement of changes in financial position based on working capital.
- . Prepare a statement of changes in financial position based on cash.
- . Compute the marginal income ratio and the breakeven point in both sales dollars and in units based on given sales, variable costs, and fixed assets.
- . Compute unit selling price, unit variable costs, and total fixed assets independently in given changes and when all given changes occur.
- . Prepare a projected comparative income statement.

EVALUTATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Some of these evaluation methods include the following:

1. Standardized and teacher-made tests
2. Business simulations and projects
3. Decision-making and problem-solving tests
4. Evaluation of independent study, research, or quest projects.
5. Oral and written report of internship experiences.
6. Evaluation of work habits, promptness, neatness, legibility, accuracy, ability to accept responsibility, and confidentiality.

INSTRUCTIONAL MEDIA: The media may include current textbooks, supplementary reference books, professional trade magazines, newspapers, pamphlets, working papers, simulated projects, transparencies, films, filmstrips, cassettes, accounting dictionaries, accounting charts and posters, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. Some suggested techniques are field trips, guest speakers, practice sets, business simulations, self-paced instruction, buddy system, learning activity packets, quest projects, and internship.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6412 COURSE TITLE: Business Communications O.E. CODE: 14.0400

COURSE DESCRIPTION: This course is designed to enable prospective business and office employees to develop oral and written communication skills, attitudes, and behavior habits needed for successful employment. Areas of study include review of basic language skills and types of oral and written business communications. Activities involve the use of practical applications of communications used in business. Typewriters should be available for student use.

LEVEL: Grades 11, 12 **CREDIT:** 1 Unit **LENGTH:** 2 Semesters

PREREQUISITE: Typewriting I

OBJECTIVES: At the end of study in Business Communications, Semester 1, the student will:

1. Demonstrate an understanding of the importance of effective oral and written communications in business and social life.
2. Possess an effective and extensive reading and writing vocabulary.
3. Consistently demonstrate a "you" attitude in all communications.
4. Exhibit self-confidence in speaking.
5. Demonstrate an understanding of the importance of good grooming, voice, and behavior in effective oral communication.
6. Use correct grammar, sentence structure, and word choice in oral communication.
7. Demonstrate an understanding of correct telephone techniques.
8. Use correct grammar, punctuation, sentence structure, and spelling to produce various types of written business communications in mailable typewritten form.
9. Compose and type mailable business correspondence (requests, granting and refusing requests, acknowledgments, transmittals of materials, and orders for goods) in accordance with current letter-writing practice.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Foundations of Effective Communication	
a. Preparing to build skill	
(1) The power of speaking and writing	• Use group discussion to introduce and explore concepts of "you" attitude, effective communication, and improvement of communication skills.
(2) The art of listening and reading	
b. Language - parts of speech	• Have students listen to taped or live discussions that exemplify good and bad affective behavior;

Outline

- c. Vocabulary and word choice
 - (1) Homonyms and synonyms
 - (2) Compounds
 - (3) Colloquialisms and slang
 - (4) Spelling and word division
 - (5) Reference materials
 - d. Ideas
 - (1) Phrases
 - (2) Clauses
 - (3) Sentences
 - (4) Paragraphs
 - e. Controlling ideas - punctuation
 - f. Capitalization, abbreviations, and numbers
2. Oral Communication
- a. Preparation
 - (1) Physical appearance
 - (2) Voice and speech
 - b. Planning and giving a talk
 - c. Meeting the public
 - (1) Person-to-person
 - (2) Telephone techniques
 - d. Conferences and meetings
 - (1) Member
 - (2) Leader

Note: May include unit on Parliamentary Procedure here. (see Section 2 of second semester)
 - e. Interviews
 - (1) For a job
 - (2) For a report
 - f. Dictating
3. Written Communication
- a. Preparing to write business letters
 - (1) Parts
 - (2) Styles
 - (3) Qualities
 - b. Simpler types
 - (1) Requests
 - (2) Granting requests
 - (3) Refusing requests
 - (4) Acknowledgments
 - (5) Transmittals
 - (6) Orders

Activities

- identify and discuss difficulties.
- Pretest for student deficiencies in English mechanics; use small-group instruction, mini-pacs, transparencies, workbooks, EDL materials, and/or programmed materials as needed to correct deficiencies.
- Use appropriate related learnings from the typewriting textbook.
- Use proofreading exercises to develop ability to detect errors in typewriting, punctuation, and word usage.
- Throughout the course, have pairs of students exchange typewritten assignments for proofreading and marking of errors (using proof-reader's marks) and return them to the author for correction before submitting to instructor.
- Throughout the course, evaluate student work with two grades: one for content and one for mechanics; for each error in mechanics, indicate a remedial assignment; have papers resubmitted.
- Use practice exercises in rewriting sentences containing stereotyped phrases, in changing negative statements to positive ones, and in building good will. (Remember, students need to be able to recognize good writing before they begin to compose letters and other types of business communications.)
- Record each student's voice; then have each student do a self-analysis and be analyzed by another student for needed improvement.

OutlineActivities

- . Have students use a full-length mirror in analyzing physical appearance, gestures, and facial expression while speaking; then have each do self-analysis and be analyzed by at least one other student for needed improvement.
- . As preparation for making a talk, preliminary attempts can be tape recorded and critiqued by the speaker and at least one other student. May need to do this several time for some students.
- . Role-play giving oral instructions for performing an unfamiliar office task. Do this face to face so that gestures may supplement instructions; also do this using the telephone so that gestures cannot be relied on to supplement or clarify instructions.
- . Role play using the telephone (teletrainer) and greeting office callers and have students evaluate using checklists developed by the class.
- . Invite a representative from the telephone company to discuss telephone techniques, company services, equipment, and employment opportunities in the telephone company.
- . Following class discussion of the topic, practice conducting short meetings with each student acting as presiding officer.
- . Discuss the art of interviewing; then role play interviewing for a report and for a job.
- . Practice dictating with tape recorder - first with written or typed copy, then with notes, and finally without notes.

OutlineActivities

- . Use projects and exercises from the typewriting textbook to review letter parts and styles, to review concept of mailability, and to upgrade skill in typewriting letters that meet business standards.
- . For each of the types of letters to be written in this course, have students critique many, many models under the guidance of the instructor to help them develop the ability to distinguish between good and bad correspondence.
- . In assigning letters to be written, discuss the problem each is to solve or the purpose each is to serve so that students identify with the situation. Questions such as these may be used to set the stage: What is the first thing the reader wants to know when reading your letter? What are the essential elements to be included? If you say no, how can you soften the blow? How can you build good will in the letter? What action do you want to influence the reader to take? How can you close the letter to secure desired action?
- . Have students write some letters alone. In some situations it might be advantageous for two students to work together. Some times letters should be written in class; at other times, as homework.
- . Discuss sample first attempts either in small groups or with the entire class, projecting the letter on the overhead projector screen. Evaluate and permit students to retype before grading.

OutlineActivities

- . Have students exchange letters with proofreading partners for location of errors; then retype.
- . Some students may ask to read their efforts aloud so that they may benefit from criticism.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. The following methods of evaluation are suggested:

1. Printed tests correlated with the textbook and other instructional materials.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests
4. Observation of class and group participation and attitudes
5. Evaluation of promptness, neatness, accuracy, and usability of assigned work
6. Evaluation of proofreading exercises to detect errors in typewriting, punctuation, spelling, and word usage.
7. Observation of the use of the "you" attitude and other appropriate behaviors in oral communication consistently
8. Evaluation of ability to give oral directions by successful completion of the task by the student receiving the directions
9. Evaluation by student reactions to communications which involve persuading another party to take action or establishing or maintaining good will
10. Checklists for evaluation of affective behaviors by fellow students and by teacher

INSTRUCTIONAL MEDIA: The media may include current business communications and typewriting textbooks, reference materials, workbooks, programmed materials, EDL materials, individualized learning packets, magazines, business reports and correspondence, transparencies, films, filmstrips, cassettes, charts, posters, dictionaries, newspapers, and bulletin board displays.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lecture, class discussion, field trips, guest speakers, self-paced instruction, individualized instruction, role playing, quest projects, group activities, and simulations.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

Business Communications
Semester 2

COURSE DESCRIPTION: This course is designed to provide additional in-depth review of basic language skills and advanced practical applications of concepts and skills included in Business Communications, Semester 1. Additional areas of study include more difficult types of business letters, job application, reports, minutes, summaries, parliamentary procedure, and introduction to word processing concepts. Typewriters should be available for student use.

PREREQUISITE: Business Communications, Semester 1

OBJECTIVES: At the end of study in Business Communications, Semester 2, the student will:

1. Show improvement in vocabulary and word choice, both in speaking and in writing.
2. Demonstrate correct and forceful oral communication skills in personal and business situations.
3. Compose and type mailable business correspondence (persuading someone to act and applying for a position) in accordance with current letterwriting practice.
4. From unorganized notes, compose a one-page typewritten report of progress, needs, results, or recommendations, with material organized and main points presented.
5. Follow oral or taped directions for performing an unfamiliar office task.
6. Analyze a one-page article from a business magazine for important points and prepare a typewritten summary of no more than 75 words.
7. Analyze the contents of a taped 15-minute speech in a typewritten summary of no more than two pages.
8. Prepare a typewritten report on the importance of communication skills in the office, using library sources and interviews with office employees.
9. Demonstrate an understanding of correct parliamentary procedure for a meeting, both as a presiding officer and as a member.
10. Take minutes of a meeting and prepare in correct typewritten form.
11. Demonstrate an understanding of automated word processing - its definition, basic concepts, advantages, and career opportunities.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Written Communications (continued from Business Communications, Semester 1)	See suggested activities involving letterwriting in Business Communications, Semester 1.
a. Business letters (1) Claims and adjustments (2) Credit and collections (3) Sales letters (4) Application for employment b. Memos and informal reports c. Formal reports d. Telegrams e. Minutes f. Summaries g. News releases	Review interoffice memos using exercises from the typewriting textbook. Have students compose and type interoffice memos to each other giving procedures to be followed in performing a task. (Also may be from teacher to student, student to teacher, superintendent to principal, principal to superintendent, etc.).
2. Parliamentary Procedure (May be included in unit on Oral Communications in Business Communications, Semester 1)	Role play giving oral instructions for performing an unfamiliar office task. Do this face to face so that gestures may supplement instructions; also do this using the telephone so that gestures cannot be relied on to supplement or clarify instructions.
a. Rules of order (1) Introduction to business (2) Types of motions (3) Motions and order of precedence (4) Committees and informal action (5) Debate and decorum (6) Vote (7) Officers and minutes (8) Other rules of order	Discuss the kinds of informal reports (progress, needs, results, and recommendations) and the purposes they serve. Have students bring to class models of informal reports they think effective and defend their choices. Then have them develop guidelines for the preparation of informal reports.
b. Organization and conduct of business (1) Organization and meetings (2) Officers and committees (3) Introduction of business (4) Motions (5) Debates and questions	Provide students with samples of unorganized notes upon which informal reports are to be based. Have the class or a small group analyze a set of notes and plan the report with teacher assistance. Have each student prepare a format to be approved before the report is typed. Hold an evaluation session before another report is attempted. Instructor should provide individual and/or group assistance as needed. To individualize instruction provide more competent students with more complicated notes for reports requiring a higher level of decision making.
c. Other procedures (1) Rights (2) Trials (3) Call of the house	

Outline

3. Introduction to Word Processing
 - a. Definition
 - b. Basic concepts
 - c. Advantages
 - d. Career opportunities

Activities

- . Use articles from business magazines and collect materials from business such as directions to employees or reports of committee meetings for students to summarize. Use same strategies as those used for the informal reports above.
- . Divide class into several groups, have them listen to a report, and have each group prepare a summary. Project one summary on the overhead projector screen for comparison with summaries of other groups. Use progressively longer and more difficult tapes.
- . Assign summaries of speeches being made in school assembly, in FBLA meetings, or on television.
- . Discuss the formal report or research paper, research techniques and procedures, and the importance of an outline. Invite librarian to discuss library facilities and their use. Provide library privileges and assistance as needed.
- . Review interview techniques discussed in Business Communications, Semester 1 for securing information from individuals for a report.
- . Take minutes of an FBLA or other meeting and prepare in correct typewritten form. Prepare news release of same.
- . Prepare in correct typewritten form a report and/or news release from notes taken during a guest speaker visit or a field trip.
- . Listen to a recorded meeting or conference, take notes, and prepare minutes, report, and/or news release in correct typewritten form.

OutlineActivities

- . After discussion of the topic, conduct real or mock FBLA meeting to practice using correct parliamentary procedures. Critique and discuss needed improvements.
- . Following class discussion of the topic, visit a word processing center and/or invite a guest speaker to discuss the topic and/or show a film on the topic. Precede and follow with discussion of equipment and procedures used, advantages, and working environment.
- . In class discussion, contrast the traditional office structure and the modern work processing system.
- . Have students bring to class advertisements of employment opportunities in the field of word processing and discuss requirements.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. The following methods of evaluation are suggested:

1. Printed tests correlated with the textbook and other instructional materials.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Observation of class and group participation and attitude.
5. Evaluation of promptness, neatness, accuracy, and usability of work.
6. Evaluation of proofreading exercises to detect errors in typewriting, punctuation, spelling, and word usage.
7. Observation of the use of the "you" attitude and other appropriate behaviors in oral communication consistently.
8. Evaluation of ability to give written directions by successful completion of the task by the student receiving the directions.
9. Evaluation by student reactions to communications which involve persuading another party to take action or establishing or maintaining good will.
10. Checklists for evaluation of affective behaviors by fellow students and by teacher.

INSTRUCTIONAL MEDIA: The media may include current business communications and typewriting textbooks, programmed materials, EDL materials, individualized learning materials, reference materials, workbooks,

magazines, newspapers, business reports and correspondence, transparencies, films, filmstrips, cassettes, charts, posters, dictionaries, and bulletin board displays.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lecture, class discussion, field trips, guest speakers, self-paced instruction, individualized instruction, role playing, quest projects, group projects, and simulations.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO: 6532 COURSE TITLE: Business Dynamics O. E. CODE: 14.9900

COURSE DESCRIPTION: This study of personality adjustment and human relations is designed to help each individual understand the actions of himself and of others and achieve more satisfying results in carrying out duties and responsibilities in any activity that involves people interaction. Topics include personal analysis, personal development, working with others, supervision of other employees, and leadership development.

LEVEL: Grades 11, 12 CREDIT: $\frac{1}{2}$ Unit LENGTH: 1 Semester

PREREQUISITE: None

OBJECTIVES: At the end of study in Business Dynamics, the student will:

1. Demonstrate a knowledge of the personal qualities needed in relationships with others.
2. Explain the importance of developing, and demonstrate the use of, the "you" attitude in interpersonal relations.
3. Recognize and improve areas of weakness in personal qualities and human relations.
4. Demonstrate industry, punctuality, and self-reliance in completing assignments.
5. Project attitudes necessary for job success.
6. Project a good personal image in the tone of voice used on the telephone and in receiving callers.
7. Accept constructive criticism.
8. Practice ethical business behavior. (Recognize ethical business behavior in case studies.)
9. Demonstrate an understanding of the qualities and competencies needed to direct and supervise the activities of others.

COURSE OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Personal Analysis and Development a. Physical appearance b. Character traits c. Attitude	Have each student complete personality rating sheets and personality inventory at the beginning and end of course and compare the two. (Confidential for each student)
2. Interpersonal Relationships a. Working together b. Supervising	Discuss and demonstrate through practice personal cleanliness, good hygiene, and physical fitness.

Outline

3. Leadership Development

Activities

- . Have students lead class discussions on readings concerning skin care, make-up, posture, and appearance.
- . Have local resource persons discuss current fashions, grooming aids, and health care.
- . Role play the use of proper etiquette and good manners.
- . Record students' voices; analyze strengths and weaknesses. Repeat later in the course and evaluate improvement.
- . Discuss effective human relations and its effect on job satisfaction.
- . Analyze human relations case studies in groups and individually.
- . Have student(s) interview employer(s) on the importance of human relations and report to class for discussion and reaction.
- . Role play and discuss situations involving teamwork in an office.
- . Analyze and discuss ethical business behavior as presented in case studies.
- . Practice giving and following instructions through role playing.
- . Discuss the characteristics of a good leader.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Suggested methods of evaluation include the following:

1. Publisher tests correlated with the textbook
2. Standardized tests with no reference to a particular text
3. Teacher-made short-answer, essay, and problem-solving tests
4. Observation of class participation and attitudes
5. Evaluation of promptness, neatness, accuracy, and legibility of assigned work.

6. Evaluation of personal appearance by teacher observation.
7. Teacher observation and evaluation of character traits and personal qualities necessary for good human relations and job success.

INSTRUCTIONAL MEDIA: The media may include current textbooks, reference books, pamphlets and brochures, case studies, films, filmstrips, transparencies, cassettes, charts, posters, periodicals, and bulletin board displays.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. The techniques may include lecture, class discussion, teacher demonstration, student demonstration, guest speakers, learning activity packets, and role playing.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6522 COURSE TITLE: Business Economics O.E.CODE: 14.9900

COURSE DESCRIPTION: This course is designed to provide students with an understanding of advanced economic concepts that will enable them to participate in a free enterprise system as wage earners, business owners, producers, and investors. Topics include advanced economic concepts, the free enterprise system, economic security, comparison of economic systems, and current economic issues.

LEVEL: Grades 11, 12 **CREDIT:** $\frac{1}{2}$ Unit **LENGTH:** 1 Semester

PREREQUISITES: None

OBJECTIVES: At the end of study in Business Economics, the student will:

1. Analyze wants and needs and establish priorities for achieving them.
2. Identify basic economic concepts.
3. Define the characteristics of a free enterprise system and explain how it affects the consumer.
4. Apply economic concepts to consumer buying and investing.
5. Demonstrate an understanding of current local, state, national, and international economic issues.
6. Compare the free enterprise system with other economic systems of the world.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. A Survey of Economics a. Definition b. Desirable economic goals c. Terminology	. Compile list of economic terms and definitions. . Have each student identify personal economic goals.
2. Basic Economic Concepts a. Scarcity b. Pricing c. Profit d. Decision-making e. Individual rights f. Supply and demand g. Gross national product	. Identify and discuss the values that influence economic decisions. . Discuss and analyze the complexities of decision-making. . Help students develop a checklist on how to shop for a used car.
3. Free Enterprise System a. Business organizations b. Production and distribution c. Government regulations	. Have students do a study of the costs of running a car.
4. Economic Security a. Banking b. Credit c. Insurance d. Savings and investments	. Have buzz sessions on civil liberties and political freedom. . Have each student elect an imaginary salary, deduct taxes, and plan a budget based on priority list of needs and wants.

Outline

5. The Consumer in the Economy
 - a. Income determinates
 - b. Buyers
 - c. Investors
 - d. Government protection
6. Economic Systems
 - a. Capitalism
 - b. Socialism
 - c. Communism
7. Critical Issues
 - a. Environment
 - b. Labor-management relations
 - c. Agriculture
 - d. Monopolies
 - e. Government interference
 - f. Economic stability
 - (1) Inflation
 - (2) Recession
 - g. Monetary and fiscal policies
 - h. State versus national controls
 - i. Conglomerates
 - j. International affairs
 - k. Future of the American economy

Activities

- . Determine through survey(s) the buying practices of families of various sizes and with various incomes and relate these practices to the change in their habits to cope with increases in cost of living.
- . Identify and discuss the characteristics of the free enterprise system.
- . Interview business persons involved in various types of business organizations to determine their concepts of a free enterprise system and make oral and/or written report.
- . Survey local businesses to determine types of organization.
- . Interview business persons to find out how prices or rates are determined and who determines them.
- . Research current government regulations on business and make oral and/or written report(s).
- . Use a questionnaire or pretest to determine the students' basic understanding of the free enterprise system.
- . Summarize in an oral or written report information on banking presented by a guest speaker.
- . Present panel discussion(s) on advantages and disadvantages of credit.
- . Discuss with an insurance agent various insurance policies and investment plans and present oral and/or written report.
- . Debate the advantages and disadvantages of investing in the stock market.

OutlineActivities

- . Explain the values (monetary and other) to be derived from work.
- . Identify and explain the government agencies that help protect the consumer.
- . Have students report on various items from the Consumers' Guide.
- . Depict by graphs the sources of government income (local, state, and federal).
- . Prepare a chart, poster, or bulletin board display depicting aids and services that the government provides consumers.
- . Plan, organize, and conduct an individual interest study on a phase of economy for the consumer.
- . Form an investment club within the class.
- . Identify and discuss similarities and differences in capitalism, socialism, and communism.
- . Research specific areas of concern in each system and present oral and/or written report(s).
- . Using current publications, research current economic issue(s) and interpret in oral and/or written report(s).
- . Interview business persons on current economic issue(s) discussed in radio or television program.
- . Participate in panel discussion(s) and/or debate(s) on current economic issue(s).
- . Negotiate a contract between teacher and students as part of study of labor/management relations and labor unions.
- . Present oral and/or written report on current economic issue(s) discussed on radio or television.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Some of these methods include the following:

1. Commercially prepared objective tests and case problems.
2. Teacher-prepared objective tests and case problems.
3. Evaluation of oral and written reports and research papers.
4. Written student self-analysis of wants and needs and their applicability to basic economic concepts.
5. Progress of student in his role as a consumer as evidenced by his buying habits.
6. Observation of class participation, ability to work with small groups and committees, attitudes, following instructions, and work habits.
7. Evaluation of promptness and accuracy in completing assignments.

INSTRUCTIONAL MEDIA: The media may include current textbooks, pamphlets, transparencies, films, filmstrips, cassettes, charts, posters, consumer guides, magazines, and newspapers.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include field trips, guest speakers, learning packets, research, surveys, interviews, games, role playing, case studies, and large and small group discussions.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6612 COURSE TITLE: Business Law O. E. CODE: 14.0800

COURSE DESCRIPTION: This course is designed to acquaint students with the basic legal principles common to business activities, including the origin and development of law, contracts, business relationships, law of property, business organization, and the law of negotiable instruments. It is not a prelaw course.

LEVEL: Grades 11, 12 CREDIT: $\frac{1}{2}$ Unit LENGTH: 1 Semester

PREREQUISITES: None

OBJECTIVES: At the end of study in Business Law the student will:

1. Interpret and apply legal principles as they relate to business and personal situations.
2. Demonstrate an understanding of common legal terms.
3. List the elements of a contract and identify and explain the various types.
4. Demonstrate an understanding of our judicial system of courts.
5. Demonstrate an understanding of legal forms used in business transactions.
6. Recognize an individual's legal rights and responsibilities in a democratic society.
7. Demonstrate an understanding of the legislative process and exhibit an awareness of legislation affecting business situations.
8. Demonstrate desirable work habits and attitudes.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Introduction	
a. Origin, development, and meaning of law	. Compile a list of legal terms with definitions.
b. Nature and kinds of laws	. Invite an attorney or judge to discuss the court system.
c. System of courts	
d. Crimes and torts	. Visit and observe a trial in court and/or a session of the General Assembly.
2. Contracts	
a. Making a contract	
b. Types of contracts	. Have students role play a trial involving a crime and one involving a tort.
(1) Expressed and implied	
(2) Formal and simple	
(3) Executed and executory	
c. Elements of a contract	. Discuss case studies involving oral and written contracts.
(1) Agreement	
(2) Proper form	
(3) Consideration	. Discuss cases that involve agreements enforceable by law.
(4) Competent parties	
d. Termination of contracts	
e. Remedies for breach	. Research newspapers for cases involving breach of contract and report to class.

OutlineActivities

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| <ul style="list-style-type: none"> 3. Law of Sales <ul style="list-style-type: none"> a. Nature of sales contracts b. Ownership and risk of loss c. Form of sales contract d. Warranties and product liability e. Consumer protection 4. Property and Property Rights <ul style="list-style-type: none"> a. Personal property <ul style="list-style-type: none"> (1) Transfer of title (2) Mortgages (3) Warranties b. Real property <ul style="list-style-type: none"> (1) Ownership (2) Transfer (3) Landlord and tenant (4) Wills and intestacy 5. Insurance <ul style="list-style-type: none"> a. Nature and theory of insurance b. Types of insurance <ul style="list-style-type: none"> (1) Property and casualty (2) Automobile (3) Life (4) Other c. Rights and Responsibilities <ul style="list-style-type: none"> (1) Insured (2) Insurer (3) Beneficiary 6. Employer and Employee <ul style="list-style-type: none"> a. Employment contracts b. Employee protection c. Fringe benefits d. Government regulations | <ul style="list-style-type: none"> . Complete sales agreements and display copies on bulletin board. . Use teacher-prepared or textbook court cases for written or oral discussion. . Invite resource persons to discuss warranties and product liability. . Use resource materials from consumer agencies to discuss consumer protection. . Prepare bulletin board display of legal forms related to topics discussed. . Present skit depicting the buying of property. . Invite speaker to discuss leases and transfer of real property. . Observe the trial of a court case involving legal principles discussed. . Invite resource person to discuss automobile insurance and policies. . Use commercially or teacher-prepared transparencies on insurance. . Present a review of how insurance can affect teenagers, in oral and/or written form. . Do research in workmen's compensation, child labor laws, social security, retirement, equal employment opportunity, and unemployment compensation and prepare oral and/or written report(s). |
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EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A few of these methods include the following:

1. Commercially prepared objective tests and case problems

2. Teacher- and/or student-prepared objective tests and case problems.
3. Student-centered assignments and related projects.
4. Observation of work habits, class participation, following instructions, and attitudes.

INSTRUCTIONAL MEDIA: The media may include current textbooks, pamphlets, trade literature, workbooks, films, filmstrips, charts, tapes, newspapers, and printed forms (legal, insurance).

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include field trips, guest speakers, games, mock trials, role playing, self-placed instruction, case studies, and class discussion.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6533 COURSE TITLE: Business Management O.E. CODE: 14.0800

COURSE DESCRIPTION: This course is designed to introduce the basic concepts of management. Topics include a general overview of American business, forms of business ownership, management functions, personnel management, labor-management relations, and women in management.

LEVEL: Grade 12 CREDIT: 1 Unit LENGTH: 2 Semesters

PREREQUISITE: Introduction to Business

OBJECTIVES: At the end of study in Business Management, Semester 1, the student will:

1. Describe the fundamental role of American business in the economy.
2. Indicate an awareness of the type and degree of government control over business.
3. Demonstrate an understanding of the American economic system as a modified free enterprise system.
4. Classify the types of business ownership available to the American businessman and demonstrate an understanding of the advantages and disadvantages of each type.
5. Formulate a basic concept of internal organization and the functions of management.
6. Describe the role of personnel management in selecting, training, and promoting employees.
7. Construct a plan for company compensation and benefits.
8. Formulate a basic concept of human relations.
9. Describe the importance of labor-management relations.
10. Demonstrate desirable personal traits necessary for success in a management position.
11. Identify career opportunities in management and the competencies necessary for various positions.
12. Demonstrate an understanding of economic terminology related to business ownership and management.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Nature of American Business	Throughout the course, include student experiences in class discussions of various topics.
a. Characteristics of business	
b. Current trends in business	
c. Career opportunities in management positions	In class discussions of assigned readings throughout the course, emphasize new terminology. (May use crossword puzzles.)
d. Government control - degree and importance	
2. Environment of American Business	
a. Economic environment	Create a bulletin board on the evolution of business, the steps in solving a business management problem, careers in business, and/or other topics throughout the course.
(1) Basic economic concepts	
(2) Economic systems	
(3) Free enterprise	
b. Social environment	
(1) Social problems	
(2) Effects on business	

OutlineActivities

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| <p>3. Business Ownership</p> <ul style="list-style-type: none"> a. Sole proprietorship b. Partnership c. Corporation d. Cooperative e. Mutual companies f. Franchises <p>4. Management Functions</p> <ul style="list-style-type: none"> a. Planning b. Organizing c. Leading d. Controlling <p>5. Personnel Management</p> <ul style="list-style-type: none"> a. Selecting new employees b. Training new employees c. Promotions, transfers, and discharges d. Personnel organizations e. Employer-employee relationships <p>6. Compensation and Benefits</p> <ul style="list-style-type: none"> a. Financial incentives b. Fringe benefits c. Benefits provided by law <p>7. Labor Relations and Legislation</p> <ul style="list-style-type: none"> a. Industrial relations b. Labor unions c. Union-management relationships d. Labor legislation <p>8. Women in Management</p> <ul style="list-style-type: none"> a. Recent trends b. Utilization of female market c. Availability of management resources d. Legislation e. Competition in the management market f. Career opportunities g. Prominent females in management | <ul style="list-style-type: none"> • Have students present oral and/or written reports on famous early business leaders. • At the beginning of the course, discuss the five steps in the procedure for solving business management case problems: <ul style="list-style-type: none"> (1) Problem - identification of the problem (2) Supportive evidence - evidence supporting identification of the problem (3) Alternative solutions - all possible solutions (4) Analysis - analyze each possible solution for good and bad points and workability (5) Solution - choose best solution(s) • Organize a weekly review of business in the news.* • Survey student attitudes toward business using a list of 20-25 statements in which students can indicate whether they agree, disagree, or have no opinion. Conduct this survey at the beginning of the course and again at the end and determine the change in attitude. This attitude survey type of activity may also be used with controversial topics such as pollution. See April 1973 issue of <u>Business Education Forum</u>, p. 45. • Introduce Junior Achievement early in the course. Contact a local office of Junior Achievement or write to the national headquarters: Junior Achievement, Inc., 909 Third Avenue, New York, NY 10022. • Have students work in groups or individually on a strip story. Various topics should be used throughout the course, such as the evolution of American business, careers in management, types of business ownership, functions of |
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OutlineActivities

management, and women in management. A strip story is a group of pictures with captions illustrating and explaining a basic concept.

- . Debate the pros and cons of various controversial topics throughout the course, such as strong government regulation of business, pollution, and the merits of selected labor legislation. Survey student attitude before and after debates to determine change.
- . Present illustrations of various economic concepts from current newspapers, news magazines, and business magazines.
- . Have students analyze the state of the economy in North Carolina.
- . Have student(s) present oral and/or written report(s) on discussion(s) with business owner(s) concerning problems encountered in competing with other businesses.
- . Obtain old and current catalogs and compare prices; present a skit to dramatize the difference; prepare a price index.
- . Research the cost of living, covering the following areas:
 - comparative costs of specific products over a given time period
 - effect of spiraling costs on real wages and living standards
 - role of government in controlling spiraling living costs
 - basis for figuring cost-of-living indices
- . Prepare a chart, poster, or bulletin board display depicting the social problems that affect business and/or those that are caused by business.

OutlineActivities

- . Prepare a report on how individuals can help in pollution control.
- . Contact a large business or industry in the local area and find out how it is combatting the pollution problem.
- . Develop a list of local businesses. Determine the form of business organization of each, the form that is most common, and the form that is largest in terms of dollars and sales.
- . Study a local business to determine year of organization, who organized it, relationship of present management, growth trend in term of dollar sales, units sold, expansion, customers served, and factors contributing to long life and success.
- . Form a corporation with five classmates and write articles of incorporation.
- . Investigate the requirements in North Carolina for organizing a corporation, obtaining a charter, selling and issuing stock, and making reports to proper state authority. Present oral and/or written report of the finding.
- . Obtain and discuss copies of franchise agreements, partnership agreements, and articles of incorporation.
- . Research the change from a closed to an open corporation (example: Ford Motor Company).
- . Form a cooperative, describing type, advantages, disadvantages, membership, and management.
- . Develop a list of mutual companies in the local business community and describe advantages of these companies in relation to the community (oral and/or written report).

OutlineActivities

- . Visit a lawyer and obtain information as to the legal requirements for forming different types of business organizations; or invite a lawyer to speak to the class on the subject.
- . Invite a speaker or a panel of speakers to discuss the small business. Your local business advisory committee and the Small Business Administration's Service Corps of Retired Executives (SCORE) are excellent resources for such speakers.
- . Have each student select a small business which he or she would like to own or manage and make an oral presentation justifying the choice.
- . Develop a set of long- and short-term goals for a small business. They should be precise, coordinated, and clearly stated.
- . Obtain organizational chart(s) from local business(es) and discuss in class.
- . Discuss the FBLA organization chart.
- . Construct an organizational chart for your FBLA chapter, an athletic team, or your school administration.
- . Develop a list of questions for a morale survey.
- . Present an oral and/or written report on the subject "Factors in Job Happiness that May Be More Important than Wages."
- . Interview a manager on the various management functions and present findings in an oral and/or written report.

OutlineActivities

- . Play the game Executive Decision by 3M Company (available at some department stores). See pages following this course guide for adaptation to entire class and rules.
- . Discuss the importance of good human relations, high morals, and effective communication in business management. This topic may also be combined with other topic(s) discussed by guest speaker(s).
- . Obtain an application form from a local business, discuss the information requested, and complete the form.
- . Interview a guidance counselor for information on businesses that employ the school's graduates. Obtain information that will be helpful to class members when applying for a job. Develop brief job descriptions including primary and secondary duties, supervisory organization, requirements for the job, salary, and promotion channels.
- . Have students present a debate on the topic: "On-the-Job Training Is Superior to Vestibule Training."
- . Invite student(s) from the school's cooperative office occupations class (if there is one) to discuss the advantages and disadvantages of the cooperative work experience program.
- . Invite a personnel manager to discuss the functions of personnel management.
- . Acquaint students with the Dictionary of Occupational Titles and discuss its usefulness in personnel selection.

OutlineActivities

- . Visit the personnel department of one or more local businesses and determine fringe benefits received by employees. Compare the importance of these benefits to the total compensation received by the employees. If possible, secure booklets or other printed information given to employees.
- . Survey local businesses and report on pension plans and health programs.
- . Interview an employer and an employee and report on their responsibilities under the Occupational Safety and Health Act.
- . Have student reports on the Social Security Act - its benefits, inequities, and loopholes.
- . Survey local businesses and report on union activity.
- . Prepare a labor contract which you believe is fair to you and to the employees of your company.
- . Discuss and/or have students report on North Carolina labor laws.
- . Play a labor-management simulation game. Suggestion: Labor Versus Management, Social Education, pp. 421-422; should be available at local libraries.
- . Research and report on trends affecting management's policies in employing women in management positions, as related in current periodicals or in interviews of personnel managers in local businesses.
- . Present a report on federal and North Carolina legislation on equal opportunity employment.

OutlineActivities

Research and report on one or more of the most prominent business women in the United States including name of company or organization, job title, salary, education, and how each became successful.

Invite a woman in management to discuss with the class various aspects of this topic, how she attained her position, and how female students may begin early to plan and prepare for a position in management.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of each student. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Suggested methods of evaluation include the following:

1. Printed tests correlated with the textbook.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Observation of class participation and attitudes.
5. Evaluation of promptness, neatness, accuracy, and legibility of assigned work.
6. Evaluation of use of business terminology in oral and written assignments and tests.
7. Evaluation of quality and quantity of participation in small-group projects.
8. Initiative and resourcefulness in completing research projects using reference materials and resource persons.
9. Evaluation of analysis of case problems based on appropriateness and reasons for decisions.

INSTRUCTIONAL MEDIA: The media may include current textbooks, reference books, pamphlets and brochures, business forms, transparencies, films, filmstrips, cassettes, charts, posters, games, case studies, dictionaries, periodicals, and bulletin board displays.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lecture, class discussion, field trips, guest speakers, self-paced instruction, learning activity packets, role playing, business games, simulations, and individual projects.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

Business Management
Semester 2

COURSE DESCRIPTION: This course is designed to continue and expand the study of those concepts presented in Business Management, Semester 1. Topics include the major aspects of business operation; trends in policies, procedures, and philosophies of business management; the role of management in the growth of American business; adapting to change; decisionmaking; public relations; and human relations. Through observation, simulation, and/or internship activities practical applications are integrated into the course content.

PREREQUISITE: Business Management, Semester 1

OBJECTIVES: At the end of study in Business Management, Semester 2, the student will:

1. Demonstrate qualities of leadership necessary for guiding and directing the activities of others.
2. Analyze and compare the importance of marketing, purchasing, banking, credit, and insurance as related to successful business operation.
3. Outline the principles of financing a business and keeping business records.
4. Describe the limitations which government has placed on business.
5. Identify and describe the taxes which are important to a businessman.
6. Demonstrate an understanding of the methods of designing an information system and the tools used in information processing.
7. Analyze and compare the specific services performed in an office and the essential problems of organizing and operating an office.
8. Apply the procedures of research for planning and decision-making.
9. Demonstrate desirable personal traits necessary for success in a management position.
10. Demonstrate an understanding of the factors the businessman must consider in determining what, when, where, and how much to purchase.
11. Indicate an awareness of the variety of sources from which a businessman can obtain financing.
12. Explain why a business may use an information processing system and how the feasibility of using such a system is determined.
13. Demonstrate an understanding of economic terminology related to business ownership and management.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Leadership a. Parliamentary procedure b. Leadership development	• Discuss qualities persons should possess to become president of an organization.

OutlineActivities

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|--|--|
| <p>2. Communications</p> <ul style="list-style-type: none"> a. Telephone b. Business letters c. Report writing d. Using reference materials e. Originating/recording information <p>3. Marketing</p> <ul style="list-style-type: none"> a. Marketing concept b. Marketing functions c. Marketing plans d. Product planning and pricing e. Advertising and promotion activities f. Location and layout g. Careers in marketing <p>4. Purchasing and Production</p> <ul style="list-style-type: none"> a. Purchasing problems b. Purchasing guidelines c. Purchasing procedures d. Stock control e. Manufacturing problems f. Shipping and transportation operations g. Loss prevention <p>5. Financial Management</p> <ul style="list-style-type: none"> a. Financial requirements of a business b. Financing a business c. Banking and credit d. Financial records e. Business insurance <p>6. Government and Business</p> <ul style="list-style-type: none"> a. Regulations to maintain competition b. Regulations affecting property rights c. Regulations protecting general welfare d. Regulations protecting consumers e. Taxation of business <p>7. Managing Information</p> <ul style="list-style-type: none"> a. Information systems b. Financial records c. Office services d. Research for planning and decision-making | <ul style="list-style-type: none"> . When guests visit or speak to the class, have students introduce them. . Nominate and elect officers in the class and conduct meetings applying rules of parliamentary procedure. . Relate the Leadership unit to FBLA by encouraging students to enter the Parliamentary Procedure competitive event and by helping them prepare for it. . Present oral and/or written reports on leadership, including characteristics, need for, steps to, and values of having leadership ability. . Participate in role playing using telephone. Use evaluation checklist. . Locate and list correct numbers and/or information for selected items from local telephone directory. . Compose letter requesting adjustment on shipment of items for resale that were damaged in transit. . Write sales letter to be sent to all charge customers promoting a new product. . Compose and type transmittal letter sending remittance for a shipment of goods. . Have student(s) survey an area of 25 homes in their neighborhood to determine, for example, the kinds of cereal used, tabulate the results of their survey, and prepare a written report of the results. The report should describe the process, show in chart or graph form the relative popularity of the various kinds, and summarize conclusions. Each student should select a different product. |
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OutlineActivities

- . Compile list of sources for selected items of information.
- . Discuss sources of information a businessman may use for various purposes.
- . Practice using dictating equipment with typed or handwritten copy.
- . Compose and record simultaneously. Evaluate tape for enunciation, word usage, and thought patterns.
- . Discuss channels of distribution from raw material to final form. Prepare distribution plan(s) for specific product(s) and depict in graphic form.
- . Organize marketing plan for product including product plan, brand name, packaging and labeling, and pricing.
- . Collect ads from newspapers and magazines; discuss appeal used by advertiser, probable audience reached, affectiveness of ads, and use of brand names and slogans.
- . Discuss federal and state regulations for packaging and labeling.
- . Use actual products in discussing product life cycle and other product concepts.
- . Prepare a bulletin board display of various forms used in connection with sales; i.e., invoices, credit memoranda, price tags, sales slips and tickets, charge slips, etc.
- . Invite a guest speaker to discuss with the class one or more of the various aspects of the marketing unit.

OutlineActivities

- . Bring in several samples of different types of products and elicit from students the possible buying motives for each.
- . Give students case problems describing the physical distribution of products and have them identify the trade channels used.
- . Discuss career opportunities in marketing including job titles and descriptions and advancement channels.
- . Discuss the personal qualities and job competencies needed by a good salesperson.
- . Simulate sales techniques through role playing.
- . Have student(s) report on North Carolina sales tax laws and follow with discussion on taxes added to the purchase price and the seller's legal obligation.
- . Give students problems involving simple price computations to emphasize the concept rather than the mathematical calculations.
- . Have students collect samples of sales promotion devices such as a product sample, a factory pack premium, or a price-oriented promotion and discuss with class.
- . Make a complete advertising and promotion plan for a selected business, indicating the types of advertising, frequency, schedule, and cost.
- . Conduct study of possible locations for a selected business; choose best location, draw map of location including nearby businesses, and give specific reasons for selecting location.

OutlineActivities

- . Prepare a detailed list of equipment needed in a selected business and prepare layout.
- . Prepare a bulletin board display of the forms used in connection with purchasing. Arrange in the form of a chart tracing the purchasing procedure.
- . Obtain sample invoices and discuss various sections.
- . Have students fill in purchase orders, invoices, requisitions, etc., based on given information. Use typewriters and adding machines or calculators.
- . Bring to class three or four examples of the same type of product. Have students rank first, second, third, etc., choice and tabulate. This would then be the basis for class discussion on why people buy as they do and how their habits affect the purchasing decisions of the store buyer.
- . Compute discounts and net amounts for case problems, using adding machines or calculators.
- . Establish purchase plan for a selected item.
- . For a selected business, establish plans for determining goods needed, and for purchasing, receiving, and handling stock.
- . Have students relate experiences in receiving and unpacking shipments and in stock control from part-time jobs.
- . Display forms used for stock control.
- . Secure inventory forms from local businesses and discuss.

OutlineActivities

- . Analyze, compare, and discuss differences in invoices and purchase orders.
- . Bring to class a variety of items and discuss the purchasing problems related to each.
- . Invite a buyer from a local store to speak on purchasing problems, or have a student interview a buyer and report to class.
- . Select specific product to be shipped various distances and determine rates and charges by all available carriers. Decide best carrier for each product.
- . Invite the head of a local manufacturing firm to discuss with the class how his plant operation is organized to control labor, materials, layout, and equipment for efficient production control.
- . Invite representative from local business to discuss strategies for loss prevention.
- . Prepare estimate of capital needs for a selected business.
- . Have group of students prepare bar graph showing relationship of expenses to gross receipts for different types of businesses. Discuss possible reasons for differences.
- . Survey local businesses to determine types of cash control used and report to class.
- . Prepare financial plan for selected business showing available capital and plans for financing balance needed.

OutlineActivities

- . Invite a local small business owner to explain how he/she determined capital requirements and obtained needed capital for his/her business.
- . Have student(s) interview local banker(s) to determine the loans available to the small business owner and the types of security required, or have a banker discuss this with the class. Include in discussion, comparison of various types of lending institutions.
- . Have students prepare simple balance sheets and income statements. Stress the importance of these documents and what they show. Do not require the same attention to detail as required in an accounting class, but rather stress the concepts.
- . Have students talk to local business owners about the kinds of records kept and the information processing techniques used, and report to class. Or use a guest speaker or plan a field trip, if possible.
- . Arrange a field trip to your school data processing center, if you have one, for an explanation of how school records are kept.
- . Participate in Mr. Banker games.
- . Simulate a collection service.
- . Analyze financial statements of two companies and make recommendations for offering or refusing credit.
- . Obtain credit application forms from two stores, complete forms, and discuss types of information requested.

OutlineActivities

- . Contact local businesses to determine how uncollectible accounts are handled.
- . Discuss case problems on state of limitations and bankruptcy, and/or invite lawyer to discuss with the class.
- . Compose and type credit and collection letters for various types of overdue accounts.
- . Invite local business representative and/or insurance agent to discuss various types of business insurance.
- . Have student(s) visit local food store and examine and evaluate labels on various food products. Present oral and/or written report on label information pertaining to contents, standards, grades, and inspection.
- . Research and report on federal, state, and local regulations, including licenses, that apply to selected businesses; determine zoning regulations involved, and indicate whether business can operate in selected location(s).
- . Conduct a study of types of taxes for which a selected business will be liable and estimate cost for a year.
- . Solve case problems concerning the analyzing and interpreting of financial records.
- . Develop accounting system for selected business and identify accounting practices.
- . Solve case problems on cash control.
- . Prepare detailed budget for operation of a selected business for one year.

OutlineActivities

- . Compute financial ratios and use those ratios in analyzing a company.
- . Plan a departmental office manual for a stenographic department.
- . Prepare list of equipment needed in small office, indicate estimated cost of each item, and determine total estimated cost. Secure prices from local dealers.
- . Discuss trends and changes in business conditions that may affect any business.
- . Compile list of sources in local community from which businessmen can obtain information on business conditions and trends.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of each student. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Suggested methods of evaluation include the following:

1. Printed tests correlated with the textbook.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Observation of class participation and attitudes.
5. Evaluation of promptness, neatness, accuracy, and legibility of assigned work.
6. Evaluation of use of business terminology in oral and written assignments and tests.
7. Evaluation of quality and quantity of participation in small-group projects.
8. Initiative and resourcefulness in completing research projects using reference materials and resource persons.
9. Evaluation of analysis of case problems based on appropriateness and reasons for decisions.

INSTRUCTIONAL MEDIA: The media may include current textbooks, reference books, pamphlets and brochures, business forms, transparencies, films, filmstrips, cassettes, charts, posters, games, case studies, dictionaries, periodicals, and bulletin board displays.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lecture, class discussion, field trips, guest speakers, self-paced instruction, learning activity packets, role playing, business games, simulations, and individual projects.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO. 6311 COURSE TITLE: Business Mathematics O.E. CODE: 14.0100

COURSE DESCRIPTION: This course is designed to enable the student to improve computational skills and to apply these skills in the performance of office tasks. Areas of study include basic skills review, cash records and banking, buying and selling, and credit. Appropriate business forms are used in each unit. Adding machines and/or calculators should be available for student use.

LEVEL: Grades 10, 11, 12 **CREDIT:** 1 Unit **LENGTH:** 2 Semesters

PREREQUISITE: None

OBJECTIVES: At the end of study in Business Mathematics, Semester 1, the student will:

1. Perform computations and prepare forms for handling a checking account, including reconciling the bank statement, using adding machine or calculator and following verbal and written instructions, and audit until all work is correct.
2. Prepare and compute sales tickets and invoices with extensions, totals, and sales tax, using adding machine or calculator and following verbal and written instructions, and audit until all work is correct.
3. Compute trade and cash discounts, finance charges, interest, and discounts on notes, from source documents with adding machine or calculator, following verbal and written instructions, and audit until all work is correct.
4. Compute metric and English measurements accurately.
5. Audit given data and compute corrections.
6. Explain verbally to another student an answer and its meaning so that it is understood.
7. Tolerate routine work without exhibiting signs of frustration or anger.
8. Work well with others involved in same tasks without revealing resentment or irritation.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Basic Skills Review	
a. Fundamental processes	• Pretest student knowledge and skill in fundamental processes, decimals, fractions, and percentages; assign individualized instructional packets and provide individual assistance as needed.
b. Aliquot parts and fractions	
c. Decimals and percentages	

Outline

- d. Common weights and measures
 - (1) English (U.S.) system
 - (2) Metric system
- 2. Cash Records and Banking
 - a. Personal
 - b. Business
- 3. Buying and Selling
 - a. Sales taxes
 - b. Sales tickets
 - c. Invoices
 - d. Discounts
 - e. Pricing
 - f. Profits
- 4. Credit
 - a. Charge accounts
 - b. Installment buying
 - c. Promissory notes

Activities

- . Discuss importance of accurate mathematical computations and records in the business office; include consumer-related problems when appropriate.
- . Demonstrate use of adding machine and/or calculator using touch control if machines are available.
- . If adding machines and/or calculators are available for student use, use self-instructional packets for students to learn correct machine operation using touch control and proper techniques. If each student does not have a machine, this may be done on rotation during review of fundamental processes.
- . Use student demonstration or explanation when appropriate.
- . Use the textbook(s) as source and develop instructional packets for various units throughout the course. A packet might include instruction sheet(s), textbook(s), self-evaluation(s), and answers to self-evaluation(s). This permits selection of material geared to ability level of student. It may be appropriate for students to work individually on some units and in small groups on other units.
- . Prepare bulletin board display showing metric measurements.
- . Solve problems involving metric measurements.
- . Obtain and display samples of business forms used in banking, buying, selling, and credit.
- . Complete a simulated project involving the use of a checking account with transactions covering one month, including the reconciliation of the bank statement.

OutlineActivities

- . Have students check computations on business forms to determine accuracy. Use forms such as invoices and sales tickets, some of which have errors in computations.
- . Have students compute extensions and totals on invoices.
- . Complete a simulated project involving the payment of invoices within the discount period, including deciding when to pay, verifying computations on each invoice, computing discounts, and writing checks.
- . Compute and discuss additional cost of goods represented in finance charges and interest costs.
- . Discuss reasons business sometimes finds it feasible and practical to borrow money and solve problems involving decision-making as related to this principle.

Business Mathematics
Semester 2

COURSE DESCRIPTION: This course is designed to permit continued improvement in computational skills and continued application of these skills in the performance of office tasks. Areas of study include payroll, income tax, investments and capital, business graphs, and computer mathematics. Appropriate business forms are used in each unit. Adding machines and/or calculators should be available for student use.

OBJECTIVES: At the end of study in Business Mathematics, Semester 2, the student will:

1. Compute entire payroll from source documents with adding machine or calculator, following verbal and written instructions, and audit until all work is correct.
2. Complete forms and perform computations for filing an individual federal and state income tax return, following written instructions, and audit until all work is correct.
3. Compute earnings from investments with adding machine or calculator, following verbal and written instructions, and audit until all work is correct.
4. Convert numbers accurately: decimal to binary, binary to decimal, and audit until correct.
5. Interpret, extract, and report correctly data on line, bar, and circle graphs.
6. Use data in reports to construct bar, line, and circle graphs to represent relationships.
7. Audit given data and compute corrections.
8. Explain verbally to another student an answer and its meaning so that it is understood.
9. Tolerate routine work without exhibiting signs of frustration or anger.
10. Work well with others involved in same tasks without revealing resentment or irritation.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Payroll	
a. Gross earnings	. Prepare bulletin board display of forms used in preparing payroll.
b. Deductions	
c. The payroll register	. Complete simulated payroll project.
d. Income tax returns	

OutlineActivities

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| <ol style="list-style-type: none"> 2. Investments and capital <ol style="list-style-type: none"> a. Savings accounts b. Stocks c. Bonds d. Partnership 3. Business Graphs - Preparation Interpretation, and Use <ol style="list-style-type: none"> a. Bar graphs b. Line graphs c. Circle graphs 4. Computer Mathematics <ol style="list-style-type: none"> a. Decimal system b. Binary system | <ul style="list-style-type: none"> . Complete IRS income tax project and state income tax project. . Compute earnings from various types of investments and compare yields as basis for deciding type of investment to choose in certain situations. . Have groups of students form imaginary partnerships and decide investment of each partner. . Have each student analyze the cost of an item which he finds interesting. . Prepare line graph of sales records to show monthly and seasonal increases and decreases. . Prepare bar graph to compare sales for various members of sales staff. . Prepare circle graph to show sources of income for a business. . Use resource speakers for appropriate topics. . Discuss the binary system and its relation to the computer and have students complete problems converting decimals to binary and binary to decimals. |
|---|---|

EVALUATION: Various techniques should be employed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Some of these methods include:

1. Printed tests correlated with the textbook
2. Standardized tests with no reference to a particular textbook
3. Teacher-made problem tests
4. Commercially prepared and/or teacher-prepared simulated projects
5. Observation of promptness, neatness, accuracy, and legibility in assigned work
6. Observation of machine technique.
7. Observation of ability to give verbal explanation of problem
8. Observation of attitude and ability to work with others and to tolerate routine, detailed work with computations

INSTRUCTIONAL MEDIA: The media used may include current text materials, drill materials, workbooks, transparencies, films, filmstrips, cassettes, charts and posters, bulletin board displays, and individualized learning packets.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include drills, job instruction sheets, individually prescribed instruction, programmed instruction, learning activity packets, and teacher and student demonstration. See also pages 33 - 34 of this guide.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII of this guide.

SDPI NO.: 6712

COURSE TITLE: Data Entry

O. E. CODE: 14.0200

COURSE DESCRIPTION: This course is designed to develop a salable skill in the operation of data entry equipment. A study of the role data entry operations play in a business environment and the types of data entry equipment are also included.

LEVEL: 10, 11, 12

CREDIT: ½ Unit

LENGTH: 1 Semester

PREREQUISITE: Typewriting I

OBJECTIVES: At the end of study in Data Entry the student will:

1. List the major developments in the history of data processing.
2. Define basic data processing terminology.
3. Explain the data processing cycle.
4. Explain the differences in manual, mechanical, unit record, and electronic data processing.
5. Explain how the computer affects businesses and individuals.
6. Identify various applications appropriate for data entry equipment based upon observations in industry.
7. Identify various input/output devices and media associated with data processing systems.
8. Operate data entry machines so that the data is usable for the next step of the system, is free from errors, and is prepared with an acceptable degree of speed necessary for employment.
9. Maintain a correct log of daily jobs.
10. Handle materials and equipment in a responsible manner.
11. Follow oral or written instructions for performing job tasks.
12. List and explain the educational background, personal qualities, and work experience needed for various careers associated with computer input devices.
13. Function cooperatively with fellow workers and supervisors.
14. Demonstrate acceptable interviewing skills to be considered for a job as a data entry operator.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Brief History and Levels of Data Processing	
a. Early records	. Prepare a report about the contributions to data processing made by Herman Hollerith.

<u>Outline</u>	<u>Activities</u>
b. Manual data processing c. Mechanical data processing d. Unit record data processing e. Electronic data processing	. Arrange small group visits to (1) a unit record equipment installation and (2) electronic data processing installation. Compare the findings.
2. Data Processing Cycle a. Origination b. Input c. Processing d. Output e. Use of data	. Prepare a report explaining the significance of the 1890 U.S. census to data processing. . Compare manual process and automated process of completing a payroll. . Prepare a bulletin board depicting the data processing cycle.
3. Use of Computers in Business and Industry a. Medical profession b. Airline industry c. Retail stores d. Governmental agencies	. Have a guest speaker from the medical profession to discuss the impact of computers on the practice of medicine.
4. Use of Data Entry Equipment in Business and Industry	. Survey local businesses to determine which types of data entry equipment are being used in the area.
5. Input and Output Methods and Media a. Punched card b. Paper tape c. Magnetic ink character recognition d. Optical character recognition e. Point of sale automation f. Printers g. Card punch h. Digital display terminal i. Graphic display terminal j. Computer output microfilm and microfiche	. Prepare bulletin board about input and output media. . Prepare a report about the effects of point of sale automation on the grocery industry. . Obtain literature about input and output devices from periodicals, manufacturers, and advertisements. . Visit a local bank to determine the uses of CRT terminals. . Compare and contrast punched cards and flexible disks citing the advantage and disadvantages relative to each. . Invite speakers to discuss the uses of output data and its importance to the effective operation of a business.

OutlineActivities

- | | |
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| 6. Data Entry Machine Operation <ul style="list-style-type: none"> a. Source documents b. Card formats and organization c. Program card codes d. Operating features of data entry equipment e. Keystroke development f. Preparation of input data | <ul style="list-style-type: none"> . Display examples of source documents. . Discuss the advantages and disadvantages of using punched cards as input media. . Explain the format of input data cards. . Explain and demonstrate the purpose of program cards. . Prepare program cards for batch processing jobs. . Practice keystroking exercises. . Use commercially or teacher-prepared task simulations involving batch processing of payroll, inventory, customer sales, accounts payable, and accounts receivable. |
| 7. Employment Opportunities in Data Processing <ul style="list-style-type: none"> a. Types of jobs <ul style="list-style-type: none"> (1) Data entry operators (2) Data processing clerks (3) Terminal computer operators (4) Programmers (5) Systems analysts | <ul style="list-style-type: none"> . Prepare a list of computer-related jobs listed in the "want ads" of a newspaper. . Invite guest speakers to discuss employment and advancement opportunities in data processing. |
| 8. Securing a Job as a Data Entry Operator <ul style="list-style-type: none"> a. Application b. Interview c. Follow-up letter | <ul style="list-style-type: none"> . Have a local personnel manager discuss the importance of an interview. . Conduct sample interviews. |

EVALUATION: Standards will vary according to the type of data entry equipment used in this class; however, minimum standards should correlate with those of industry. It is the teacher's responsibility to determine the skill requirements needed for student employability. A number of evaluation methods include:

1. Observation
2. Application and theory tests
3. Assigned simulated projects
4. Ability to follow written and oral directions

INSTRUCTIONAL MEDIA: The media may include current data entry text materials, pamphlets, transparencies, films, filmstrips, cassettes, bulletin boards, and simulated projects.

INSTRUCTIONAL APPROACHES: Instructional approaches may include a combination of individual and group activities. Suggested approaches include field trips, guest speakers, business simulations (teacher and commercially prepared), integrated projects, and self-paced instruction.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6722 COURSE TITLE: Data Processing I O.E. CODE: 14.0200

COURSE DESCRIPTION: This course is designed to equip the student with a background of data processing concepts, fundamentals of input/output media, impact of computers on businesses and individuals, employment opportunities in data processing, flowcharting and a basic understanding of current computer programming languages. A computer or computer terminal is used for hands-on operational experiences. A student who has successfully completed Introduction to Data Processing should enroll in the second semester of Data Processing I.

LEVEL: Grades 11, 12 **CREDIT:** 1 Unit **LENGTH:** 1 Year

PREREQUISITE: None

OBJECTIVES: At the end of study in Data Processing I, the student will:

1. List the major developments in the history of data processing.
2. Explain the differences in manual, mechanical, unit record and electronic data processing.
3. Define basic data processing terminology and the data processing cycle.
4. Discuss positions taken about current issues involving computers.
5. Identify applications appropriate for a computer system in business and industry.
6. Explain the effects of computers on activities of individuals.
7. Identify capabilities and limitations of a computer system.
8. Identify various input/output devices and media associated with data processing systems.
9. Identify the hardware and software used in selected computer systems.
10. Explain the impact of mini computers on business organizations and individuals.
11. Explain the purpose of system and program flowcharting.
12. Differentiate between online and offline data processing.
13. Explain the advantages, disadvantages and applications of various types of computer programming languages.
14. Develop program logic charts.
15. Write and execute programs in at least two computer languages.

16. Use data entry equipment to prepare computer programs.
17. Use the computer as a decision-making tool in seeking a solution to specified problems.
18. Follow oral and written directions.
19. Summarize computer output and convert into usable reports.
20. Demonstrate acceptable work attitudes and behavior.
21. Maintain work area in an acceptable manner.
22. Handle materials, tools, and equipment in a responsible manner.
23. List and explain the educational background, personal qualities, and work experience needed for various careers in data processing.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Brief History and Levels of Data Processing a. Early records b. Manual data processing c. Mechanical data processing d. Unit record data processing e. Electronic data processing	. Prepare a report about the contributions to data processing made by Herman Hollerith, Charles Babbage, Howard Aiken, John Mauchly, and J. Presper Eckert. . Illustrate decrease in size of data processing equipment by displaying vacuum tube, transistor, and integrated circuit.
2. Data Processing Cycle a. Origination b. Input c. Processing d. Output e. Use of data	. Arrange small-group visits to (1) a unit record equipment installation and (2) electronic data processing installation. Compare the findings. . Prepare a booklet of data processing terms.
3. Use of Computers in Business and Industry a. Accounts payable systems b. Accounts receivable systems c. Payroll systems d. Inventory systems	. Compare manual process and automated process of "billing" customers for goods or services. . Construct flowcharts of a local business's system for handling inventory and payroll. . Survey local businesses to determine types of input used.

<u>Outline</u>	<u>Activities</u>
4. Impact of Computers a. Medical profession b. Airline industry c. Retail stores d. Governmental agencies e. Individual activities	. Prepare a bulletin board about the various ways people come in contact with computers. . Conduct debates about fundamental issues such as "computer theft," "cashless society," "invasion of privacy by the users of computers," and "data-banks." . Prepare a report about how point of sale automation affects the grocery industry. . Compare manual and computerized methods of processing airline reservations. . Discuss the impact of computers on the home, gas station, schools, and hobbyists.
5. Capabilities and Limitations of Computers	. Design flowcharts to show the flow of tasks in making a telephone call. . Have guest speakers to discuss growth, speed, and cost of computers used in businesses. . Discuss popular myths about computers. . Prepare a report about the number of manufacturers of computer systems. . Discuss <u>1984</u> and <u>Brave New World</u> as they relate to current capabilities and limitations of computers. . Discuss ways computer assisted instruction can be used in Business Mathematics.
6. Input and Output Methods and Media a. Punched card b. Paper tape c. Magnetic ink character recognition	. Prepare bulletin board about input and output media. . Display examples of microfilm and microfiche.

OutlineActivities

- | | |
|---|--|
| d. Optical character recognition | . Compare and contrast punched cards and flexible disks citing the advantages and disadvantages relative to each. |
| e. Point of sale automation | |
| f. Printers | |
| g. Card punch | |
| h. Digital display terminal | . Invite speakers to discuss the uses of output data and its importance to the effective operation of a business. |
| i. Graphic display terminal | |
| j. Computer output microfilm and microfiche | |
| 7. Minicomputers | . Discuss possible uses of computers at a high school. |
| a. Applications | |
| b. Advantages and limitations | |
| c. Impact for the future | . Prepare a summary of the most recent manufacturers' advertisements for minicomputers. |
| 8. Online and Offline Data | . Visit a local bank to determine the uses of CRT terminals. |
| a. Online and offline data input devices | |
| b. Realtime systems | . Discuss the advantage of real-time methods as opposed to batch processing methods to handle hotel reservations, bank accounts, and patient monitoring. |
| c. Applications | . Interview a local reservationist's clerk about the use of online equipment. |
| 9. Survey of Computer Languages | . Contact business firms to determine why they are using a particular language. |
| a. Types | |
| (1) FORTRAN | |
| (2) COBOL | |
| (3) BASIC | |
| (4) Other current computer languages | |
| b. Advantages and disadvantages of each | |
| 10. Computer Languages - FORTRAN | . Devise abbreviations to use in writing a source program in FORTRAN for these phrases, limited to five words |
| a. Nature of FORTRAN | |
| b. Hierarchy of operations | |
| c. Structure | |
| (1) Character set | (1) gross pay |
| (2) Constants | (2) hours worked |
| (3) Variables | (3) sales tax |
| (4) Statements | percentage |
| 11. Computer Languages - COBOL | . Construct flowcharts. |
| a. Nature of COBOL | |
| b. Data organization | . List steps involved in translating source program into machine language program. |
| (1) Description of files, records, and fields | |

<u>Outline</u>	<u>Activities</u>
(2) Types of data c. Divisions (1) Basic structure (2) Coding requirements (3) Environment division (4) Data division (5) Procedure division	. Maintain a notebook of common COBOL words or names. . Obtain a copy of a COBOL and FORTRAN program from a computer center. Analyze what the program is designed to do. . Explain how a COBOL program can be modified to be used on a different make of computer. . Prepare a bulletin board listing and summarizing types of information contained in each program division. . Discuss the processing of updating a file. . Construct programs from tested flowcharts and test run until correct. . Assign teams to develop a program for a problem solving activity. Choose the most appropriate solution. . Construct a program for producing a sales report. . Discuss differences in FORTRAN and COBOL.
12. Employment Opportunities in Data Processing a. Types of jobs (1) Data entry operators (2) Data processing clerks (3) Terminal computer operators (4) Programmers (5) Systems Analysts b. Educational background and training needed for data processing careers c. Employment demand	. Prepare a list of computer-related jobs listed in the "want ads" of a newspaper. . Invite guest speakers to discuss employment and advancement opportunities in data processing. . Interview someone employed in data processing to determine educational and training background needed for that career.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A few of these methods include:

1. Printed tests correlated with the textbook.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Problems prepared in class and out of class.
5. Evaluation of oral participation, discussion, homework, independent study, and attitudes.
6. Evaluation of promptness, neatness, accuracy, and legibility in assigned work.
7. Business simulations and projects.

INSTRUCTIONAL MEDIA: The media may include current data processing textbooks, supplementary data processing textbooks, pamphlets, workbooks, transparencies, films, filmstrips, cassettes, data processing dictionaries, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches may include a combination of individual and group activities. Suggested approaches are field trips, guest speakers, practice sets, projects, self-paced instruction, and learning activity packages (commercially and teacher prepared).

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6723 COURSE TITLE: Data Processing II O. E. CODE: 14.0200

COURSE DESCRIPTION: This course is designed to teach electronic data processing systems and procedures. Students will write programs in several programming languages and will operate the computer system. Each program prepared should be increasingly difficult and should relate to the business world and to the student's desired field of employment. Concentrated independent study concepts and simulations are utilized.

LEVEL: Grade 12 **CREDIT:** 1 Unit **LENGTH:** 1 year (2 hours)

PREREQUISITES: Data Processing I

OBJECTIVES: At the end of study in Data Processing II, the student will:

1. List at least five manufacturers of computer systems.
2. Demonstrate proficiency in equipment manipulation.
3. Execute programs correctly in at least three programming languages and make modifications which allow programs to run faster.
4. Analyze problems and use the computer as a tool in solving problems.
5. Define a business system and explain the operation of commonly found business systems such as: accounts payable, personnel accounting, payroll accounts receivable, and inventory.
6. Explain the importance of communication between programmers and managers of departments for which computer systems serve.
7. Demonstrate desirable personal traits necessary in a data processing environment.
8. Demonstrate acceptable interviewing skills to be considered for a job in a data processing installation.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES

<u>Outline</u>	<u>Activities</u>
1. Review of Computer Languages	. Write programs and analyze output.
a. FORTRAN	. Use case studies as project assignments to show typical jobs that are commonly done with computers.
b. COBOL	. Complete a term project based on realistic work situations.
2. Advanced Programming in FORTRAN and COBOL	. Visit computer installation using FORTRAN or COBOL.
3. Computer Programming--RPG	
a. Flowcharting review	

- b. Language advantages and disadvantages
- c. Introduction
- d. Specifications
 - (1) Input
 - (2) Calculation
 - (3) Output
 - (4) Control and file description
 - (5) Extension and line counter
- e. Supplementary information
- f. Programming

(The computer languages taught may vary from region to region depending upon equipment available and language used by local businesses.)

- 4. Business Systems
 - a. Accounts payable
 - b. Personnel accounting
 - c. Payroll
 - d. Accounts receivable
 - e. Inventory

- 5. Objectives of a System Study

- 6. Independent Study
 - a. Research
 - (1) Library
 - (2) Community
 - (3) School
 - b. Report
 - c. Program
 - d. Implications

- 7. Securing a Job in Data Processing
 - a. Application
 - b. Interview
 - c. Follow-up

- . Construct flowcharts.
- . List steps involved in translating source program into machine language program.
- . Write programs in RPG and analyze output.
- . Discuss differences in programming languages.
- . Debug programs written by other students.
- . Prepare and design projects beneficial to the school.
- . Prepare community surveys and polls.
- . Study school's system of doing attendance reports.
- . Prepare a report on a local company's system of handling payroll.
- . Discuss cost justification of a systems study.
- . Interview a systems analyst about objectives of a systems study.
- . Prepare library reading lists.
- . Determine the number of men and women in data processing jobs.
- . Write a program that handles some aspect of playing cards.
- . Fill out applications for businesses advertising a vacancy in data processing.
- . Have a local data processing department manager discuss the qualities needed by a data processing worker.
- . Discuss personal traits needed for a job in data processing.
- . Conduct sample interviews.

EVALUTION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A few of these methods include:

1. Printed tests correlated with the textbook.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Problems prepared in class and out of class.
5. Evaluation of oral participation, discussion, homework, independent study, and attitudes.
6. Evaluation of promptness, neatness, accuracy, and legibility in assigned work.
7. Business simulations and projects.

INSTRUCTIONAL MEDIA: The media may include data processing textbooks, supplementary data processing books, pamphlets, workbooks, transparencies, films, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches may include a combination of individual and group activities. Suggested approaches include field trips, guest speakers, case studies, business simulations, self-paced instruction, learning activity packages (commercially and teacher prepared), library research, and independent study.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6010 COURSE TITLE: Introduction to O. E. CODE: 14.9900
Business

COURSE DESCRIPTION (Semester 1): This course is a study of the role of business in our free enterprise system with major emphasis on the individual as a consumer, a worker, a producer, and well-informed citizen. Areas of study include the free enterprise system; business and the consumer; insurance; banking; credit; investments; personal money management; business terminology; the relationships of government, business, and labor; and career opportunities in business.

PREQUISITE: None

LEVEL: Grades 9, 10

CREDIT: 1 Unit

LENGTH: 2 Semesters

OBJECTIVES: At the end of study in Introduction to Business, Semester 1, the student will:

1. Demonstrate knowledges, abilities, attitudes, appreciation, and understanding of the free enterprise system.
2. Demonstrate fundamental understandings for becoming intelligent buyers, users, and producers of business goods and services.
3. Demonstrate an understanding of basic economic risks and the role of insurance as protection against these risks.
4. Demonstrate an understanding of the role of banking institutions in the American economy and the application of banking services for the individual.
5. Demonstrate an understanding of the concept of credit as a major purchasing medium for the individual and for business.
6. Demonstrate an understanding of and appreciation for establishing a sound savings and investment program.
7. Demonstrate an understanding of and appreciation for personal money management.
8. Demonstrate an understanding of the relationships of government, business, and labor as they function and interact in our economic world.
9. Demonstrate the ability to use business terminology correctly as it applies to business activities.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Free Enterprise System	
a. Profit motive	
b. Business organization	
(1) Classification of businesses	
(2) Structure and ownership	
	Discuss the characteristics of the American free enterprise system.

<u>Outline</u>	<u>Activities</u>
c. Business cycles (1) Economic trends (2) Business reaction to trends d. Economic systems (1) Planned economy (2) Mixed economy	. Identify and/or compare the proprietorship, partnership, corporation, and cooperatives. . Describe the conditions that exist in periods of prosperity, recession, and depression.
2. Business and the Consumer	. Compare our economic system to those of other countries.
a. Buymanship (1) Comparison shopping (2) Advertising analysis b. Consumer protection (1) Government agencies (2) Private agencies c. Sources of consumer information	. Identify factors that influence consumer choices. . Discuss emotional and rational buying.
3. Economic Risks and Insurance	. Obtain and analyze various advertisements geared to the teenage consumer.
a. Purpose b. Kinds of insurance (1) Life (2) Health and accident (3) Property (4) Automobile (5) Income c. Insurance planning	. Discuss the relationship of quality and price and comparison shopping. . Describe the government's role in consumer protection.
4. Banks and Banking Services	. Research the laws designed to protect the consumer and present in group activities.
a. Functions of banks b. Services provided by banks (1) Checking (2) Savings (3) Trusts c. Consumer loans d. Function of the Federal Reserve System	. Discuss the recent emergence of consumer awareness groups. . Discuss the reasons individuals, families, and businesses need insurance.
5. Credit	. Explain the concept of sharing economic risks.
a. Consumer credit (1) Installment (2) Non-installment b. Advantages and disadvantages c. Basis for granting credit d. Interest rates e. Government regulations	. Identify the various types of life insurance and the purposes of each. . Obtain and discuss a life insurance application.
6. Savings and Investments	. Describe life insurance as a means of saving.
a. Savings (1) Purposes (2) Methods b. Investments (1) Reasons for investing (2) Types of investments	. Determine and explain the various types of health and accident insurance.

<u>Outline</u>	<u>Activities</u>
6. (Continued) (3) Investment risks (4) Sources of investment information	. Identify the reasons for purchasing property insurance. . Identify and describe liability, comprehensive, and collision insurance.
7. Money Management and Budgeting a. Needs vs wants b. Factors influencing consumer choice c. Money management program (1) Budget preparation (2) Budget execution	. Describe the social security program and its role in retirement. . Display and discuss various insurance policies.
8. Government, Business, and Labor a. Levels of government b. Interaction of government, business, and consumers c. Taxes d. The labor movement (1) Labor unions (2) Labor-management relations	. Identify precautions to help avoid occurrence of economic loss. . Research and discuss the necessary steps for adequate family insurance planning. . Explain and discuss the function of banking in an economic society. . Study government regulation of banks. . Identify national and state banks. . Display and discuss various banking forms. . Explain the purpose of trust departments in banks. . Compare bank loans with those of other lending institutions. . Discuss the purpose of the Federal Reserve System. . Identify the Federal Reserve districts on a display map. . Depict the flow of money between banks through charts or posters. . Simulate a loan department in a bank through role playing. . Discuss the differences in a long- and short-term credit.

OutlineActivities

- . Display various types of credit applications.
- . Identify and compare the advantages and disadvantages of buying on credit.
- . Identify and discuss the three C's of credit.
- . Research and discuss the role of the credit bureau.
- . Present problems to illustrate the computation of the dollar cost of credit and the percentage cost of credit.
- . Discuss the process of shopping for credit as for any other consumer item.
- . Research the Truth in Lending Law and demonstrate its importance to the consumer.
- . Discuss the reasons for developing a savings program.
- . Identify and evaluate various savings plans.
- . Determine the current interest rates on savings accounts.
- . Contrast a savings account with other methods of savings such as life insurance, stocks, and annuities.
- . Determine the difference in a savings program and an investment program.
- . Distinguish between safe-dollar investing and speculative investing.
- . Discuss the difference between stocks and bonds with respect to investment risks.
- . Identify the advantages and disadvantages of home ownership.

OutlineActivities

- . Display issues of current periodicals emphasizing investment information.
- . Obtain and analyze a newspaper stock market report.
- . Describe the difference between needs and wants.
- . Display different advertisements to demonstrate their impact on consumer choice.
- . Explain and discuss the concept of conspicuous consumption.
- . Display and discuss good and poor merchandise labels.
- . Identify and describe major characteristics of a money management program.
- . Prepare an individual and a family budget.
- . Discuss the importance of following the planned budget.
- . Demonstrate how good budget planning can increase income.
- . Identify and discuss the relationship between local, state, and federal government.
- . Research governmental regulation of business.
- . Discuss government protection of small business and control of large business.
- . Prepare simple income tax forms.
- . Discuss the various types and uses of taxes such as property, income, and sales.
- . Explain and discuss government sponsored job programs.

- . Identify and describe government protection of the environment - local and federal.
- . Discuss the difference in open, union, and closed shop.
- . Show through role playing good and poor labor-management relations.
- . Explain the origin of the labor movement.
- . Discuss the emergence of labor unions as a powerful force in today's business activity.
- . Identify and display the sources of consumer information.

Introduction to Business Semester 2

COURSE DESCRIPTION: This course is designed to use the project approach in reinforcing the concepts presented in Introduction to Business, Semester 1. Prerequisite: Introduction to Business, Semester 1

OBJECTIVES: Same as Introduction to Business, Semester 1.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
(Same as Introduction to Business, Semester 1)	
NOTE: Approximately 2½ to 3 weeks on each of the 8 topics.	
Also, students may make up their own activities.	
	. Make a survey of the businesses that exist in your community. Classify the businesses as sole proprietorships, partnerships, corporations, cooperatives, and non-profit corporations. Identify the characteristics of each type of business organization. . Read one day's edition of your local newspaper. Clip all articles related to business activity. Determine how each of these affect your community. . Review several business magazines for the current week. Make a list of the economic problems discussed and provide a brief summary of each article. . Determine the trends in our Gross National Product for the past ten years. Prepare a graphic presentation to display in the classroom. . Make a comparison of capitalism, socialism, communism, and fascism from viewpoint of competition, business ownership, and production. . From the literature, determine the various sources of capital for American business. . Each year thousands of businesses fail in this country. Prepare an outline listing some of the reasons for such failures. . Interview someone at the local Chamber of Commerce and determine what plan the Chamber has

OutlineActivities

for attracting new industries to your community and if they want new industries to locate there.

- . From the literature, determine why we both import and export some of the same products, such as textiles, cars, etc.
- . Determine the steps to be taken when a consumer believes that he has been treated unfairly by a business firm.
- . Select ten grocery store items. Prepare a description of each including the item name, size, price, etc. Visit five grocery stores and compare the prices of each of the ten items. Determine the reasons for the differences in prices.
- . Select ten items at a drug store in your community. For the next month record the prices of these ten types of merchandise on a weekly basis. Discuss the increase or decrease in price.
- . Review the current business literature on inflation. Prepare a report on how inflation affects you as a consumer.
- . Collect advertisements from magazines and newspapers and put in booklet form. Analyze the ads for fairness to the consumer.
- . From the business literature, determine how government controls advertising in an attempt to protect the consumer.
- . Select one "old time" store and one recently remodeled or constructed store in your community. Determine the reasons for the differences in types of services, such as self-service, packaging, display, use of credit cards, parking facilities, etc.

OutlineActivities

- . Select several items of interest to you. Prepare an advertisement that you think would appeal to the consumer.
- . Develop a report on new proposals and legislation concerning consumer protection which have been passed in North Carolina in the past five years. This may include food safety and labeling, automobile safety, antitrust actions, etc. Consumer Reports and Consumer Bulletin will be helpful. Pay particular attention to the N. C. Legislature.
- . Do research on impulse buying. Investigate several retail stores to find out what kinds of items they put where customers will buy them on impulse.
- . Observe shoppers in at least two stores to detect good and poor buying practices. Prepare a report on your findings.
- . Visit a local insurance company and determine the types of life insurance available. Compare the features of the various types such as whole life, straight life, term, and endowment plans.
- . Visit a local insurance agency and determine the cost for obtaining life insurance at ages 16, 25, 30, and 50. Make a comparison and determine the reasons for the differences.
- . Visit the local Social Security office and determine the steps to be taken in obtaining a social security card.
- . Investigate the concept of "no-fault" insurance for North Carolina. Obtain information from states which have already initiated no-fault plans.

OutlineActivities

- . Visit a local insurance firm and determine the types of insurance a 21-year-old, married man with one child should have.
- . Visit the local Social Security office and investigate the Medicare program. To whom does it apply and how does it operate.
- . Investigate the fire insurance rates on houses in various sections of your community. From the literature, determine the reasons for the differences in rates, such as condition of home, etc.
- . Read the newspaper available in the classroom or library for a one-month period and select any articles that describe actual cases in which persons have suffered economic losses - such as floods, hurricanes, tornadoes, etc.
- . Inspect your own home and/or garage for hazards that might cause a fire. Prepare a list of these and propose what should be done to reduce risks.
- . Visit the local fire station or headquarters of the city fire department and find out the number of fires that occurred during the past month, the principal causes, the number of people injured, and other significant information. Prepare a written report.
- . Interview the principal or the assistant principal and ask what insurance policies are carried to protect the school against losses resulting from fire, theft, or other causes. Also ask him to explain to what extent the school district is protected against personal liability claims from students,

OutlineActivities

teachers, and others who may be injured while on the school premises.

- . Interview a highway patrolman to discuss the most common reasons for auto accidents and ways of preventing them. Invite this person to talk to class.
- . Select three banks in your community and determine the procedure in each for opening a checking account. Determine the various costs that are involved at each bank such as checks, service charges, etc. Decide which bank would be the most beneficial to you.
- . Determine the names of the various banks in your community and determine what kinds of banks they represent (commercial, industrial, etc.).
- . Select one bank in your community and determine the various services that it offers you as a consumer.
- . Visit the various banks in your community and determine whether they are state banks, national banks, or Federal Reserve banks. Compare the differences and similarities of each.
- . Through library research, determine the structure and functions of the Federal Reserve System and prepare a report.
- . Make a collection of various banking forms which you, as a consumer, can use.
- . Prepare a map showing the 12 districts of the Federal Reserve System.
- . From the literature, write a history of banking in the United States.

OutlineActivities

- . All officials who carry major responsibilities in a bank are bonded. From the literature, determine what this means and why it is important to the bank and to customers of the bank.
- . Look through your local newspaper for the past week. Clip all articles dealing with credit and summarize each article.
- . Visit the credit bureau in your community and investigate the types of information collected on consumers. Report the results.
- . Assume that you would like to borrow \$1,000. Make a comparison of interest rates which would be charged on the loan if the money were borrowed from a bank, a credit union, or a consumer finance company.
- . Determine the cost of different methods of financing an automobile - through a credit union, finance company, bank, etc.
- . A family with a relatively low income and little property might have a very good credit rating and one with a large income and considerable property might have a poor credit rating. From the literature, explain what this means and why.
- . In many cities there are businesses known as pawnshops. Investigate the local area and determine if there are pawnshops and determine how pawnshops operate as lending agencies.
- . Collect newspaper advertisements of firms which lend money. Mark any information which you consider to be useful to the public and any which you consider to be misleading. Present orally.

OutlineActivities

- . Obtain from local consumer finance companies and banks schedules of the interest rates which they charge on loans. Make a comparison and determine which is better for the consumer.
- . Pay particular attention to current news items relating to interest rates and determine what effect this will have on various markets, such as housing, etc.
- . Investigate the laws in North Carolina relating to the garnishment of wages. First determine what this means from your textbook and/or other reference materials.
- . Make a list of the various types of savings institutions in your community.
- . Collect items pertaining to savings and investments from your local newspaper. Summarize each article.
- . Select ten stocks from the local newspaper and keep daily records of the fluctuations in price for a one-month period. Prepare graphic presentations and explain the events that you think caused the fluctuations.
- . Assume that you have \$1,000 which you would like to put into savings. Investigate the advantages of placing the money in a savings account in a bank, in a savings and loan company, and in insurance.
- . Visit the local stock exchange and observe the activities of the various stocks. Prepare a reaction of your experience.

OutlineActivities

- . From the literature, make a comparison of municipal bonds and corporate bonds and summarize your findings.
- . Make a survey to determine if there are any investment clubs available in your community. You might consult the phone directory and stock brokers in determining this.
- . Cooperatives and condominiums are becoming more and more popular as a means of home ownership. Through research in the library, find out what these are and make a report on the advantages and disadvantages of owning them. Also, check your local area to see if they are available.
- . The most important investment a young person can make is in himself. Think about this statement. Prepare a complete report explaining what this means to you.
- . If you had lived in the 1870's, what kind of industries would you have invested in and why? What kind of industries would you invest in today and why? Prepare a report.
- . Review the advertisements in your local newspaper for one week. Determine the "buy of the week," and justify your selection.
- . Select several commonly used goods and prepare a Buyer's Guide including cost, contents, etc.
- . Select several advertisements and determine the appeal that is being made to the consumer in each.
- . Prepare a budget for yourself based on your weekly income and expenditures.

OutlineActivities

- . Survey several families in your community and determine how many prepare budgets and plan their spending.
- . Select several products which your family might purchase. Determine the ratings for these products in Consumer Reports or Consumer Research Bulletin. Include how the testing was done and the ratings given to various brands.
- . From newspaper and other sources, try to find out how much money was budgeted for the following items by your town, county, or district: school needs, streets or highways, police department, fire department, public welfare, mayor's office, public library, and parks. Check the figures for the past year.
- . Interview several retired persons to identify in what ways the standard of living of each has been affected by inflation.
- . Determine the types of state and local taxes that citizens of your community must pay.
- . Investigate the departments of the local government in your community and determine the purposes of each, where the money to operate each is obtained, etc. Prepare a report of your findings.
- . Collect articles from your local newspaper on government regulation of business.
- . Assume that you earn \$1,000 a year from a part-time job. Prepare your own federal and state income tax forms for the year.

OutlineActivities

- . Determine the social responsibility of business in relation to ecology, consumer protection, etc.
- . From the literature, determine the responsibility of the federal government in fighting inflation.
- . From the literature, explain the difference between depression and recession. Describe the characteristics of each.
- . Interview a worker in your community who belongs to a labor union. Find out the advantages of such a membership. If possible, interview a worker in the same field who is not a member of a labor union and would not want to become a member; find out his reasons. Prepare a report.
- . Group Report - 4 people.
Dramatize a meeting between representatives of a labor union and representatives of management to discuss terms of a new contract. Present to class.
- . From the literature determine which natural resources other than energy might be in jeopardy in the United States unless steps are taken to preserve them. Present in written form.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. The following methods of evaluation are suggested:

1. Printed tests correlated with the textbook.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Observation of class participation and attitudes.
5. Evaluation of promptness, neatness, accuracy, and legibility of assigned work.
6. Evaluation of use of business terminology in oral and written assignments and tests.

INSTRUCTIONAL MEDIA: The media may include current textbooks, reference books, pamphlets, business forms, transparencies, films, filmstrips, cassettes, charts, posters, dictionaries, periodicals, and bulletin board displays.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lectures, class discussions, field trips, guest speakers, self-paced instruction, learning activity packets, role playing, quest projects, and business games.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6710 COURSE TITLE: Introduction to O. E. CODE: 14.0200
Data Processing

COURSE DESCRIPTION: This course is designed to acquaint students with the basic concepts of data processing. Major emphasis is placed on understanding the fundamental principles applicable to the processing of information. Major topical areas also include introduction to and the history of the computing industry, impact of computers on businesses and individuals, input/output media, survey of computer languages and equipment, and data processing careers. This course does not require equipment.

LEVEL: Grades 10, 11, 12 CREDIT: 1/2 Unit LENGTH: 1 Semester

PREREQUISITE: None

OBJECTIVES: At the end of study in Introduction to Data Processing the student will:

1. List the major developments in the history of data processing.
2. Explain the differences in manual, mechanical, unit record and electronic data processing.
3. Define basic data processing terminology and the data processing cycle.
4. Discuss positions taken about current issues involving computers.
5. Identify applications appropriate for a computer system in business and industry.
6. Explain the effects of computers on activities of individuals.
7. Identify capabilities and limitations of a computer system.
8. Identify various input/output devices and media associated with data processing systems.
9. Identify the hardware and software used in selected computer systems.
10. Explain the advantages, disadvantages and applications of various types of computer programming languages.
11. Explain the impact of minicomputers on business organizations and individuals.
12. Explain the purpose of system and program flowcharting.
13. Differentiate between online and offline data processing.
14. List and explain the educational background, personal qualities, and work experience needed for various careers in data processing.
15. Follow oral and written instructions correctly.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Brief History and Levels of Data Processing - Early records - Manual data processing - Mechanical data processing - Unit record data processing - Electronic data processing	- Prepare a report about the contributions to data processing made by Herman Hollerith, Charles Babbage, Howard Aiken, John Mauchly, and J. Presper Eckert. - Illustrate decrease in size of data processing equipment by displaying vacuum tube, transistor, and integrated circuit.
2. Data Processing Cycle - Origination - Input - Processing - Output - Use of data	Arrange small-group visits to (1) a unit record equipment installation and (2) electronic data processing installation. Compare the findings.
3. Use of Computers in Business and Industry - Accounts payable systems - Accounts receivable systems - Payroll systems - Inventory systems	Prepare a bulletin board about the various ways people come in contact with computers.
4. Impact of Computers - Medical profession - Airline industry - Retail stores - Governmental agencies - Individual activities'	- Compare manual process and automated process of "billing" customers for goods or services. - Design flowcharts to show the flow of tasks in making a telephone call.
5. Capabilities and Limitations of Computers	Prepare bulletin board about input and output media.
6. Input and Output Methods & Media - Punched card - Paper tape - Magnetic ink character recognition - Optical character recognition - Key disk and tape - Flexible disk (floppy disk) - Point-of-sale automation - Printers - Card punch - Digital display terminal - Graphic display terminal - Computer output microfilm and microfiche	- Prepare a booklet of data processing terms. - Have guest speaker to discuss growth, speed, and cost of computers used in businesses. - Construct flowcharts of a local business's system for handling inventory and payroll. - Discuss popular myths about computers.

Outline

7. Minicomputers
 - a. Applications
 - b. Advantages and limitations
 - c. Impact for the future
8. Online and Offline Data
 - a. Online and Offline data input devices
 - b. Realtime systems
 - c. Applications
9. Survey of Computer Languages
 - a. Types
 - (1) FORTRAN
 - (2) COBOL
 - (3) BASIC
 - (4) Other current computer languages
 - b. Advantages and disadvantages of each

Activities

- . Compare manual and computerized methods of processing airline reservations.
- . Prepare a report about the the number of manufacturers of computer systems.
- . Discuss possible uses of computers at a high school.
- . Conduct debates about fundamental issues such as "computer theft," "cashless society," "invasion of privacy by the users of computers," and "data-banks."
- . Discuss the books 1984 and Brave New World as they relate to current capabilities and limitations of computers.
- . Display examples of input and output media.
- . Survey local businesses to determine types of input used.
- . Prepare a report about point of sale automation and how it affects the grocery industry.
- . Display examples of microfilm and microfiche.
- . Obtain literature about input and output devices from periodicals, manufacturers, and advertisements.
- . Compare and contrast punched cards flexible disks citing the advantages and disadvantages relative to each.
- . Visit a local bank to determine the uses of CRT terminals.
- . Invite speakers to discuss the uses of output data and its importance to the effective operation of a business.

OutlineActivities

- 10. Employment Opportunities in Data Processing
 - a. Types of jobs
 - (1) Data entry operators
 - (2) Data processing clerks
 - (3) Terminal computer operators
 - (4) Programmers
 - (5) Systems analysts
 - b. Educational background and training needed for data processing careers
 - c. Employment demand
- . Prepare a summary of the most recent manufacturers' advertisements for minicomputers.
 - . Discuss the impact of computers on the home, gas station, schools, and hobbyists.
 - . Discuss the advantages of realtime methods as opposed to batch processing methods to handle hotel reservations, bank accounts, patient monitoring.
 - . Discuss ways computer assisted instruction can be used in Business Mathematics.
 - . Interview a local reservationist's clerk about the use of online equipment.
 - . Contact business firms to determine why they are using a particular language.
 - . Prepare a list of computer-related jobs listed in the "want ads" of a newspaper.
 - . Invite guest speakers to discuss employment and advancement opportunities in data processing.
 - . Interview someone employed in a phase of data processing to determine educational and training background.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A few of these methods include:

1. Printed tests correlated with the textbook.
2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.

4. Problems prepared in class and out of class.
5. Evaluation of oral participation, discussion, homework, and attitudes.
6. Evaluation of promptness, neatness, accuracy, and legibility in assigned work.
7. * Assigned projects.

INSTRUCTIONAL MEDIA: The media may include current data processing textbooks, supplementary data processing textbooks, pamphlets, workbooks, transparencies, films, filmstrips, cassettes, data processing dictionaries, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches may include a combination of individual and group activities. Suggested approaches are field trips, guest speakers, practice sets, projects, self-paced instruction, and learning activity packages (commercially and teacher prepared).

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII of this guide.

SDPI NO.: 6612 COURSE TITLE: Office Occupations I O.E. CODE: 14.9900

COURSE DESCRIPTION: This course is designed to provide the student with a background for further study and job preparation in Office Occupations II or Simulated Office Training. Areas of instruction include the organization and functions of offices, employment opportunities in business, behavior and grooming, information processing concepts, handling the mail, business machines, oral communication skills, reprographics, cash control systems, inventory systems, receptionist duties, reference materials, filing, employment procedures, and job simulations. Review of language art, computation, and typewriting skills is integrated with other instructional units.

LEVEL: Grades 11, 12 CREDIT: 1 unit LENGTH: 1 year

PREREQUISITE: Typewriting I

OBJECTIVES: At the end of study in Office Occupations I, the student will:

1. Identify the types and functions of offices as they relate to the total operation of businesses.
2. Identify at least ten classifications of office workers and list the duties, knowledges, skills, and personal traits needed for each.
3. Demonstrate acceptable office and social behavior and attitudes.
4. Demonstrate basic language skills through oral and written business communications.
5. Operate ten-key, full-keyboard, printing, electronic, and reprographics machines with proficiency and proper utilization to solve business related problems correctly.
6. Identify, store, and retrieve information correctly using alphabetic, subject, numeric, and geographic filing systems.
7. Type letters, business forms, tables, duplicating master, and reports in mailable form using an electric typewriter.
8. Spell and define selected business terminology from a wide variety of business fields.
9. Demonstrate proficiency in processing interoffice, incoming, and outgoing mail.
10. Select appropriate mail service so that communications can be sent by the appropriate method in terms of importance, time factor, and cost.
11. Demonstrate ability to locate business information using reference materials and other sources.
12. Process data correctly and identify terms used in cash control systems, inventory and stock control systems, and shipping systems.

13. Perform the duties of a receptionist.
14. Select appropriate telephone/telegraphic services.
15. Identify multiple applications appropriate for a computer system based upon observation at local businesses.
16. Identify the steps in the data processing cycle.
17. Follow oral and written instructions correctly.
18. Handle materials and equipment in a responsible manner.
19. Complete at least two job simulations successfully.
20. Demonstrate the ability to apply for a job during an interview situation.
21. Prepare a letter of application data sheet; and application blank, in acceptable form.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. The Business World	
a. Classification of industries	. Survey the community to determine the classifications of businesses such as financial, professional, and governmental institutions. Determine the types of business related jobs available at each.
b. Organizational structure of businesses	. Write a report about the organizational structure of at least three different types of businesses in the area.
c. Functions of the office	. Prepare a bulletin board showing the organizational charts of two local businesses.
	. Compare centralized office plan to a decentralized office plan.
	. Interview several office managers to determine the functions and purpose of those offices. Compare findings.

Outline

2. Employment Opportunities in Business
 - a. Types of positions available
 - b. Duties
 - c. Skills and knowledges needed
 - d. Personal traits
 - (1) Grooming
 - (2) Office behavior

Activities

- . Prepare bulletin board about area employment opportunities in local businesses.
- . Conduct small group sessions to give students opportunities to discuss their occupational choices; solicit peer evaluation of the suitability for these choices.
- . Have a panel of office workers discuss skills and knowledges needed to perform their jobs.
- . Use the Dictionary of Occupational Titles to demonstrate the broad range of office jobs available.
- . Have students write the Employment Security Commission to obtain data about the projected labor market demands for office workers.
- . Invite buyer of local clothing store to demonstrate ways to mix and match clothing to be worn socially and in the office.
- . Construct a list of questions to ask selected office workers about the duties they perform; use these questions to interview office workers. Report findings to the class.
- . Invite personnel manager to speak about reasons people lose their jobs.
- . Invite guest speakers to talk about the different aspects of grooming.
- . Prepare a booklet showing appropriate dress for the office.
- . Complete personality rating sheet.

Outline

3. Skills Inventory Review
 - a. Language arts
 - b. Mathematics
 - c. Typewriting
 - (1) Letters and memos
 - (2) Reports
 - (3) Business forms

4. Communication Skills
 - a. Listening
 - b. Oral and written communications
 - (1) Public relations letters
 - (2) Interoffice memos
 - (3) Inquiry letters
 - (4) Telephone communications
 - c. Communication services
 - (1) Receiving and placing calls
 - (2) Telephone equipment
 - (3) Special communication services
 - (4) Telegraph services
 - d. Human relations
 - e. Receiving callers
 - (1) Courtesy
 - (2) Appointments

Activities

- . Discuss the policies manual of a local company to determine acceptable office behavior and standards for that company.
- . Administer pretest to determine students' weaknesses in language art skills, math and typewriting.
- . Prescribe individualized units of instruction based upon the results of pretest.
- . Display samples of business forms, letters, reports, and legal papers.
- . Discuss the impressions of non-verbal influences on communications.
- . Record students during a conversation. Evaluate voice qualities.
- . Discuss reasons why people fail to listen.
- . Invite a speech teacher to discuss ways to improve the voice.
- . Record student telephone conversations and then evaluate.
- . Compose and type letters to local telephone company inquiring about types of telephone equipment.
- . Compose and type interoffice memo to school bookstore requesting supplies.
- . Invite local telephone representative to speak about good telephone techniques.
- . Illustrate proficiencies in telephone usage through simulated telephone calls.

Outline

5. Information Processing
 - a. Data processing cycle
 - b. Methods of processing data
 - (1) Mechanical
 - (2) Unit record
 - (3) Electronic
 - c. Uses of data processing equipment
 - (1) Adding/calculating machines
 - (2) Word processing equipment
 - (3) Computers

Activities

- . Display types of telephone equipment.
- . Display examples of telegram and mailgrams.
- . Demonstrate courtesy and tact in handling callers in a simulated office situation.
- . Observe a receptionist at work. Report findings to class.
- . Use role playing situations to illustrate ways of handling callers' requests and problems.
- . Use diagram to illustrate the data processing cycle for filing a business paper.
- . Explain how automation has changed the role of the office employee.
- . Visit and observe a data processing and word processing center.
- . Discuss the merger of data processing and word processing centers.
- . Interview an office employee to determine how the use of computers has changed his/her job tasks.
- . Prepare a bulletin board showing the types of data electronic processing equipment, word processing equipment, and adding/calculating machines.
- . Develop proficiency in the operation of business machines using a rotation schedule and programmed materials.

Outline

6. Reprographics
 - a. Methods of duplication
 - b. Cost and time features of duplicating and copying processes
7. Storage and Retrieval Systems
 - a. Filing procedures
 - b. Alphabetic, numeric, subject, chronological, and geographical filing
8. Handling the Mail
 - a. Incoming correspondence
 - b. Outgoing correspondence
 - c. Interoffice correspondence

Activities

- . Visit offices containing equipment that is different from that in the classroom.
- . Compose and duplicate a report about the advantages and disadvantages of at least three duplicating methods.
- . Compose and type a letter to a copier company requesting information about the features of their copiers.
- . Duplicate the agenda of an FBLA meeting.
- . Design and duplicate the program for an FBLA activity.
- . Visit and observe centralized filing area of a local business.
- . Discuss the importance of correctly preparing materials to be filed.
- . Show examples of microfilm and microfiche.
- . Complete a simulated filing project.
- . Visit and observe the handling of mail at a local postal facility.
- . Type mailing list on cards and file using two types of filing systems.
- . Invite local postal employee to discuss postal regulations and types of mail services.
- . Process mail through simulated projects.

Outline

9. Types of Mailing and Shipping Services
 - a. Domestic mail service
 - b. International mail
 - c. Special postal services
 - d. Preparation of goods for shipment
 - e. Methods of shipment
 - f. Shipping papers
 - g. Use of shipper's reference books

10. Use of Reference Materials

11. Cash Control Systems
 - a. Budgets
 - b. Handling incoming and outgoing funds
 - c. Banking services
 - d. Bank statement reconciliations
 - e. Handling petty cash
 - f. Cash control job simulation

Activities

- . Prepare postal and shipping services display.
- . Determine the number and types of shipping companies in the local area.
- . Compare shipping costs using The United States Postal Service Manual, Express and Parcel Post Comparative Rate Guide, and Leonard's Guide.
- . Make a list of reference materials used in banking, credit and finance, accounting and travel.
- . Write and type a report requiring the use of reference materials.
- . Compose and type a report about the proper way to type minutes of a meeting and a business report.
- . Visit local offices to find out kinds of reference materials being used by various clerical workers.
- . Prepare a budget for an FBLA activity.
- . Compute the differences in the actual expenditures and the projected expenditures of a selected budget.
- . Discuss banking services with a bank official.
- . Complete a checking account simulation.
- . Prepare a bulletin board display of forms of payment such as voucher check, money orders, and certified checks.
- . Maintain records for a simulated petty cash fund.

OutlineActivities

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| <p>12. Inventory and Stock Control Systems</p> <ul style="list-style-type: none"> a. Functions and types of inventory systems b. Maintenance of inventory records and reports c. Inventory system job simulation | <ul style="list-style-type: none"> . Survey at least three local businesses to determine how inventory is maintained. . Discuss ways automation is affecting inventory control and records. . Compute cost value and quantity on hand using an inventory tally sheet of a local business. . Complete a simulated inventory simulation. |
| <p>13. Job Simulations</p> <ul style="list-style-type: none"> a. Clerk typist b. File clerk c. Accounts payable clerk d. Accounts receivable clerk e. Clerk-steno f. Receptionist g. Duplicating equipment operator h. Other | <ul style="list-style-type: none"> . Complete job simulations and integrated projects to meet career objectives of individuals. |
| <p>14. Employment Procedures</p> <ul style="list-style-type: none"> a. Application papers and letters b. Interviews c. Promotional opportunities | <ul style="list-style-type: none"> . Discuss sources of employment. . Research employment testing procedures of local companies. . Compose and type an application letter, a resume, follow-up and thank-you letters. . Video tape mock interviews and evaluate each student; ask students to evaluate the interviews of others and themselves. . Discuss advancement opportunities for clerical workers and keeping a job. |

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Some of these methods include:

1. Printed tests correlated with the textbook(s).

2. Standardized tests with no reference to a particular text.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Evaluation of oral participation, discussion, homework, and attitudes.
5. Evaluation of promptness, neatness, accuracy, and legibility of assigned work.
6. Business simulations and projects.

INSTRUCTIONAL MEDIA: The media may include current textbooks, job simulations, integrated projects, supplementary books, pamphlets, workbooks, transparencies, films, filmstrips, cassettes, charts and posters, dictionaries, reference books, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches may include a combination of individual and group activities. Suggested approaches are field trips, guest speakers, practice sets, business simulations (in-basket, unipack, task, model office), integrated projects, self-paced instruction, learning activity packages (commercially and teacher prepared), quest projects and rotations.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII of this guide.

SDPI NO.: 6613 COURSE TITLE: Office Occupations II O.E. CODE: 14.9900
Cooperative

COURSE DESCRIPTION: This two-hour block course combines classroom instruction with work experience in a business office. Instruction in a simulated office setting includes the areas of office efficiency, meeting office production standards, records management, inter-personal relationships, word processing skills and concepts, personal taxes, handling meetings and conferences, travel and accommodation services, payroll, purchases and accounts payable systems, sales and accounts receivable systems, and written communications. Review and refinement of communication, computation, and typewriting skills are integrated with the instructional units through the use of office simulations. In addition, students receive practical work experience in business offices with job-related classroom instruction designed in the form of individualized remedial and enrichment learning activities.

LEVEL: Grade 12

CREDIT: 3 units

LENGTH: 1 year

PREREQUISITES: Office Occupations I or Data Processing I or Accounting I or Shorthand I, depending on student career objective

OBJECTIVES: At the end of study in Office Occupations II, Cooperative, the student will:

1. Employ correct spelling, grammar, and punctuation in composing and typing business correspondence, reports, business forms, legal papers, and minutes.
2. Express written ideas in letters, memos, and reports so that they meet office standards of usability through the use of transcribers, typewriters, and other media.
3. Demonstrate the ability to meet office production standards in typing letters, reports and business forms while working under pressure of time, interruptions, noise, and changing priorities.
4. Place and answer telephone calls that give and receive business information that is complete and in acceptable business form.
5. Process data and identify terms used in payroll, purchases, accounts payable, sales, and accounts receivable systems.
6. Demonstrate the ability to follow oral or written instructions correctly.
7. Decide the appropriate process of reproduction in terms of product, cost and use of copies.
8. Demonstrate the ability to store and retrieve information using at least four filing systems.
9. Decide upon appropriate systems of record management and make recommendations for change when given problem situations.

10. Use travel and accommodation services and available travel funds in planning and expediting business trips.
11. Complete income tax returns correctly.
12. Exhibit interpersonal skills and etiquette that are acceptable in business.
13. Analyze the interrelationships of office jobs and recognize the dependency of various functions on sophisticated equipment.
14. Correctly complete at least five job simulations.
15. Demonstrate the refinement of office skills, knowledges, and personal qualities through the use of a model office simulation.
16. Spell and define selected business terminology from a wide variety of business fields.
17. Identify work priorities in order to plan and organize work accordingly.
18. Develop job skills and knowledges necessary to secure a job in a business-related field.
19. Communicate ideas effectively to individuals and/or groups.
20. Demonstrate acceptable work attitudes and behavior.
21. Handle materials and equipment in a responsible manner.
22. Maintain appropriate personal hygiene and appearance acceptable for the business office.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Review of Employment Procedures	. Diagnose weaknesses of students during a mock interview. Make appropriate suggestions for improvement.
2. Office Efficiency	. Discuss how human relations affect job performance and morale.
a. Human relations	. Discuss case studies involving human relations.
b. Personality	. Develop display posters depicting office efficiency.
c. Teamwork	. Develop skits illustrating poor and productive office efficiency.

OutlineActivities

3. Records Management Control

- a. Review of filing procedures
- b. Management of records system
- c. Micrographics
- d. Electronic data processing storage and retrieval systems

4. Word Processing Skills Development

- a. Machine transcription
- b. Giving and taking dictation
- c. Work scheduling
- d. Rough draft revisions and formatting
- e. Letter composition, outlines and reports
- f. Office stationery
- g. Appropriate process of copying and duplicating
- h. Word processing job simulation

- . Type summaries and discuss magazine articles dealing with team effort and human relations.
- . Invite an office manager to discuss the importance of teamwork.
- . Observe team effort in the school office. Report findings to class.
- . Discuss reasons people are promoted other than educational background.
- . Outline and type desirable personality traits.
- . Visit a local business to determine the number of filing methods used.
- . Show examples of special files used by local businesses.
- . Develop a filing system for a restaurant.
- . Discuss the advantages of using microfilming and microfiche.
- . Invite speaker to explain how electronic data processing equipment affects the storage and retrieval of information.
- . Develop transcription proficiency through rotation on transcribing machines.
- . Design individualized remedial and enrichment drills depending upon student transcription weaknesses.
- . Compare the method of handling correspondence in a company having a word processing center and one without a center.
- . Develop outlines for the preparation of dictating correspondence.

OutlineActivities

- 5. Purchases and Accounts Payable Systems
 - a. Function of purchases
 - b. Budgeting
 - c. Requisitioning
 - d. Ordering
 - e. Receiving
 - f. Handling accounts payable
 - g. Remittance, claims and adjustment letters
 - h. Purchases/accounts payable job simulation
- . Have students dictate letters to each other for transcribing.
 - . Type correspondence from rough draft copy.
 - . Maintain daily job logs of work performed by student.
 - . Observe an office worker and then develop a work schedule for that worker.
 - . Prepare a bulletin board illustrating types of word processing equipment.
 - . Secure price lists of office stationery, supplies, and equipment, and duplicating equipment.
 - . Read magazine articles and advertisements about types of copying and duplicating equipment on the market.
 - . Decide appropriate duplication method for assigned projects and materials.
 - . Compose and type a report about available dictating equipment.
 - . Complete word processing job simulation.
 - . Discuss types of purchasing budgets and the dependency of purchases on sales.
 - . Prepare a budget for a retail store selling records.
 - . Type requisitions and purchase orders for purchasing records.
 - . Compare purchase orders with receiving reports.
 - . Compose and type letters dealing with adjustment and claims.

OutlineActivities

6. Sales and Accounts Receivable Systems
 - a. Customer contact
 - (1) Sales letters
 - (2) Telephone communications
 - b. Processing orders
 - c. Billing
 - d. Customer complaints
 - e. Recording sales
 - f. Preparing statements, acknowledgments, credit, and collection letters
 - g. Sales and accounts receivable simulation
7. Payroll Systems
 - a. Methods of payment
 - b. Payroll data
 - c. Preparing the payroll
 - d. Payroll job simulation
8. Personal Taxes
 - a. Income tax recordkeeping
 - b. Income tax returns

- . Discuss the relationship of purchases to accounts payable.
- . Record pertinent data in accounts payable ledgers.
- . Complete purchases/accounts payable job simulation.
- . Role play situations involving customer contact.
- . Compose and type sales promotion letters.
- . Discuss methods of checking a customer's credit.
- . Invite speaker from credit bureau to discuss the importance of a good credit rating.
- . Prepare invoices for a group of purchase orders.
- . Record pertinent information in accounts receivable ledger.
- . Complete sales/accounts receivable job simulation.
- . Discuss the effects of government regulations upon payroll procedures.
- . Examine tables of deductions and do practice exercises.
- . Complete a simulated payroll project.
- . Illustrate ways to maintain income tax records.
- . Obtain forms and booklets from government revenue agencies.
- . Complete income tax forms.

OutlineActivities

- | | |
|---|---|
| <p>9. Planning Business Travel</p> <ul style="list-style-type: none"> a. Travel services b. Domestic and international travel c. Hotel/motel arrangements d. Travel funds e. Itineraries and expense reports f. Letters making reservations | <ul style="list-style-type: none"> . Compose and type a report about a country each student would like to visit. . Invite a local travel agent to discuss services a travel agency offers. . Illustrate securing reservations for hotel and travel through simulated situations. . Plan airline schedule for a trip to Chicago using airline flight schedules. . Compose and type letters of reservation. . Discuss types of travel funds available and the advantages and disadvantages of each. . Prepare an itinerary and expense report. |
| <p>10. Meetings and Conferences</p> <ul style="list-style-type: none"> a. Planning and arranging b. Letters and follow-up c. Minutes of meetings | <ul style="list-style-type: none"> . Discuss and plan a district FBLA meeting. . Compose and type an agenda for FBLA meeting. . Compose and type letters for handling all arrangements. |
| <p>11. Job Simulations</p> <ul style="list-style-type: none"> a. Legal typist b. Corresponding secretary c. Administrative assistant d. Medical typist e. Real estate clerk f. Insurance clerk g. Others | <ul style="list-style-type: none"> . Complete job simulations to meet career objectives of students. |
| <p>12. Office Simulation</p> | <ul style="list-style-type: none"> . Use model office simulation to reflect realistic office organization, work flow, oral and written communications, interpersonal relations, priorities, and office standards of usability. |

OutlineActivities

13. Cooperative Work Experience

- . Relate classroom instruction to on-the-job work experience.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A number of these methods include:

1. Printed tests correlated with textbook(s).
2. General standardized tests.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Evaluation of oral participation, discussion, setting work priorities, attitudes, handling of materials and equipment, and ability to meet office standards.
5. Checklist of promptness, neatness, and accuracy in all assigned work.
6. Business simulations and projects.
7. Employer evaluations.

INSTRUCTIONAL MEDIA: The media may include textbooks, supplementary books, pamphlets, workbooks, transparencies, films, filmstrips, cassettes, reference manuals, dictionaries, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches may include field trips, guest speakers, practice sets, business simulations (in-basket, unipack, task, model office, teacher prepared), integrated projects, career-related projects, self-paced instruction, work experience, learning activity packages (commercially and teacher prepared), quest projects, rotations, and model office simulations.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII of this guide.

SDPI NO.: 6623 COURSE TITLE: Office Occupations II O.E. CODE: 14.9900
Directed

COURSE DESCRIPTION: This two-hour-block course combines classroom instruction with meaningful in-school office work experience. Instruction in a simulated office setting includes the areas of office efficiency, meeting office production standards, records management, interpersonal relationships, word processing skills and concepts, personal taxes, handling meetings and conferences, travel and accommodation services, payroll, purchases and accounts payable systems, sales and accounts receivable systems, and written communications. Review and refinement of communication, computation, and typewriting skills are integrated with the instructional units through the use of office simulations. In addition, students receive practical work experience in school offices and through using an office simulation. Individualized remedial and other enrichment learning activities are also used.

LEVEL: Grade 12

CREDIT: 2 units

LENGTH: 1 year

PREREQUISITES: Office Occupations I

OBJECTIVES: At the end of study in Office Occupations II, Directed, the student will:

1. Employ correct spelling, grammar, and punctuation in composing and typing business correspondence, reports, business forms, legal papers, and minutes.
2. Express written ideas in letters, memos, and reports so that they meet office standards of usability through the use of transcribers, typewriters, and other media.
3. Demonstrate the ability to meet office production standards in typing letters, reports and business forms while working under pressure of time, interruptions, noise, and changing priorities.
4. Place and answer telephone calls that give and receive business information that is complete and in acceptable business form.
5. Process data and identify terms used in payroll, purchases, accounts payable, sales, and accounts receivable systems.
6. Demonstrate the ability to follow oral or written instructions correctly.
7. Decide the appropriate process of reproduction in terms of product, cost and use of copies.
8. Demonstrate the ability to store and retrieve information using at least four filing systems.
9. Decide upon appropriate systems of record management and make recommendations for change when given problem situations.

10. Use travel and accommodation services and available travel funds in planning and expediting business trips.
11. Complete income tax returns correctly.
12. Exhibit interpersonal skills and etiquette that are acceptable in business.
13. Analyze the interrelationships of office jobs and recognize the dependency of various functions on sophisticated equipment.
14. Correctly complete at least five job simulations.
15. Demonstrate the refinement of office skills, knowledges, and personal qualities through the use of a model office simulation.
16. Spell and define selected business terminology from a wide variety of business fields.
17. Identify work priorities in order to plan and organize work accordingly.
18. Develop job skills and knowledges necessary to secure a job in a business-related field.
19. Communicate ideas effectively to individuals and/or groups.
20. Demonstrate acceptable work attitudes and behavior.
21. Handle materials and equipment in a responsible manner.
22. Maintain appropriate personal hygiene and appearance acceptable for the business office.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Review of Employment Procedures	. Diagnose weaknesses of students during a mock interview. Make appropriate suggestions for improvement.
2. Office Efficiency	. Discuss how human relations affect job performance and morale.
a. Human relations	. Discuss case studies involving human relations.
b. Personality	. Develop display posters depicting office efficiency.
c. Teamwork	. Develop skits illustrating poor and productive office efficiency.

OutlineActivities

3. Records Management Control

- a. Review of filing procedures
- b. Management of records system
- c. Micrographics
- d. Electronic data processing storage and retrieval systems

4. Word Processing Skills Development

- a. Machine transcription
- b. Giving and taking dictation
- c. Work scheduling
- d. Rough draft revisions and formatting
- e. Letter composition, outlines and reports
- f. Office stationery
- g. Appropriate process of copying and duplicating
- h. Word processing job simulation

- . Type summaries and discuss magazine articles dealing with team effort and human relations.
- . Invite an office manager to discuss the importance of teamwork.
- . Observe team effort in the school office. Report findings to class.
- . Discuss reasons people are promoted other than educational background.
- . Outline and type desirable personality traits.
- . Visit a local business to determine the number of filing methods used.
- . Show examples of special files used by local businesses.
- . Develop a filing system for a restaurant.
- . Discuss the advantages of using microfilming and microfiche.
- . Invite speaker to explain how electronic data processing equipment affects the storage and retrieval of information.
- . Develop transcription proficiency through rotation on transcribing machines.
- . Design individualized remedial and enrichment drills depending upon student transcription weaknesses.
- . Compare the method of handling correspondence in a company having a word processing center and one without a center.
- . Develop outlines for the preparation of dictating correspondence.

OutlineActivities

- 5. Purchases and Accounts Payable Systems
 - a. Function of purchases
 - b. Budgeting
 - c. Requisitioning
 - d. Ordering
 - e. Receiving
 - f. Handling accounts payable
 - g. Remittance, claims and adjustment letters
 - h. Purchases/accounts payable job simulation
- . Have students dictate letters to each other for transcribing.
 - . Type correspondence from rough draft copy.
 - . Maintain daily job logs of work performed by student.
 - . Observe an office worker and then develop a work schedule for that worker.
 - . Prepare a bulletin board illustrating types of word processing equipment.
 - . Secure price lists of office stationery, supplies, and equipment, and duplicating equipment.
 - . Read magazine articles and advertisements about types of copying and duplicating equipment on the market.
 - . Decide appropriate duplication method for assigned projects and materials.
 - . Compose and type a report about available dictating equipment.
 - . Complete word processing job simulation.
 - . Discuss types of purchasing budgets and the dependency of purchases on sales.
 - . Prepare a budget for a retail store selling records.
 - . Type requisitions and purchase orders for purchasing records.
 - . Compare purchase orders with receiving reports.
 - . Compose and type letters dealing with adjustment and claims.

OutlineActivities

6. Sales and Accounts Receivable Systems
 - a. Customer contact
 - (1) Sales letters
 - (2) Telephone communications
 - b. Processing orders
 - c. Billing
 - d. Customer complaints
 - e. Recording sales
 - f. Preparing statements, acknowledgments, credit, and collection letters
 - g. Sales and accounts receivable simulation
7. Payroll Systems
 - a. Methods of payment
 - b. Payroll data
 - c. Preparing the payroll
 - d. Payroll job simulation
8. Personal Taxes
 - a. Income tax recordkeeping
 - b. Income tax returns

- . Discuss the relationship of purchases to accounts payable.
- . Record pertinent data in accounts payable ledgers.
- . Complete purchases/accounts payable job simulation.
- . Role play situations involving customer contact.
- . Compose and type sales promotion letters.
- . Discuss methods of checking a customer's credit.
- . Invite speaker from credit bureau to discuss the importance of a good credit rating.
- . Prepare invoices for a group of purchase orders.
- . Record pertinent information in accounts receivable ledger.
- . Complete sales/accounts receivable job simulation.
- . Discuss the effects of government regulations upon payroll procedures.
- . Examine tables of deductions and do practice exercises.
- . Complete a simulated payroll project.
- . Illustrate ways to maintain income tax records.
- . Obtain forms and booklets from government revenue agencies.
- . Complete income tax forms.

<u>Outline</u>	<u>Activities</u>
9. Planning Business Travel a. Travel services b. Domestic and international travel c. Hotel/motel arrangements d. Travel funds e. Itineraries and expense reports f. Letters making reservations	. Compose and type a report about a country each student would like to visit. . Invite a local travel agent to discuss services a travel agency offers. . Illustrate securing reservations for hotel and travel through simulated situations. . Plan airline schedule for a trip to Chicago using airline flight schedules. . Compose and type letters of reservation. . Discuss types of travel funds available and the advantages and disadvantages of each. . Prepare an itinerary and expense report.
10. Meetings and Conferences a. Planning and arranging b. Letters and follow-up c. Minutes of meetings	. Discuss and plan a district FBLA meeting. . Compose and type an agenda for FBLA meeting. . Compose and type letters for handling all arrangements.
11. Job Simulations a. Legal typist b. Corresponding secretary c. Administrative assistant d. Medical typist e. Real estate clerk f. Insurance clerk g. Others	. Complete job simulations to meet career objectives to students.
12. Office Simulation	. Use model office simulation to reflect realistic office organization, work flow, oral and written communications, interpersonal relations, priorities, and office standards of usability.

13. Directed Work Experience

- . Relate classroom instruction with work experience.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A number of these methods include:

1. Printed tests correlated with textbook(s).
2. General standardized tests.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Evaluation of oral participation, discussion, setting work priorities, attitudes, handling materials and equipment, and ability to meet office standards.
5. Checklist of promptness, neatness, and accuracy in all assigned work.
6. Business simulations and projects.

INSTRUCTIONAL MEDIA: The media may include textbooks, supplementary books, pamphlets, workbooks, transparencies, films, filmstrips, cassettes, reference manuals, dictionaries, and bulletin boards.

INSTRUCTIONAL APPROACHES: Instructional approaches may include field trips, guest speakers, practice sets, business simulations (in-basket, unipack, task, model office, teacher prepared), integrated projects, career-related projects, self-paced instruction, work experience, learning activity packages (commercially and teacher prepared), quest projects, rotations, and model office simulations.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII of this guide.

SDPI NO.: 6321 COURSE TITLE: Recordkeeping O. E. CODE: 14.0100

COURSE DESCRIPTION (Semester 1): This course is designed to prepare students for occupations requiring a variety of clerical accounting skills. The student gains an elementary insight into the organization, operation, and control of business through the use of a series of fundamental recording activities. Learning activities that provide for review and reinforcement of computational skills are interwoven into the course content. Areas of study include personal recordkeeping and income taxes, cashier records, petty cash, banking, sales, and purchases. Adding machines and/or calculators should be available for student use.

LEVEL: Grades 10, 11 CREDIT: 1 Unit LENGTH: 2 Semesters

PREREQUISITE: Business Math or pretest equivalency

OBJECTIVES: At the end of study in Recordkeeping, Semester 1, the student will:

1. Demonstrate proper work habits and attitudes.
2. Demonstrate skill and accuracy in computations (manual and/or machine).
3. Demonstrate the ability to maintain personal business records and prepare personal income tax returns.
4. Demonstrate an understanding of elementary business concepts and procedures.
5. Demonstrate an understanding of the duties of a cashier.
6. Demonstrate the ability to maintain a petty cash fund and petty cash records.
7. Demonstrate the ability to open a checking account, endorse checks, write checks, and reconcile a bank statement.
8. Demonstrate an understanding of the various services of banks.
9. Demonstrate the ability to record cash and charge sales on sales forms of various styles and compute the sales tax.
10. Demonstrate an understanding of sales returns and allowances.
11. Demonstrate the ability to open, post to, and balance a customer's account in a ledger and prepare the customer's statement of account.
12. Demonstrate the ability to keep stock record cards and prepare purchase requisitions, price quotation cards, and purchase orders.
13. Demonstrate an understanding of the concept of stock and inventory control through the use of proper recordkeeping and purchasing procedures.
14. Demonstrate an understanding of accounts payable procedures.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Introduction	. Pretest and analyze students math skills and weaknesses, review math principles and make individual assignments as needed.
a. Purpose of records	
b. Accuracy	
c. Legibility	
d. Computations (manual and/or machine)	. Use EDL Skillbuilder 5 minutes per day to build speed and accuracy in mental computations.
2. Personal Recordkeeping	
a. Planning personal finances	. Use programmed materials for rebuilding arithmetic skills if necessary.
b. Records of income and expenses	
c. Summarizing income and expenses	. Use adding and/or calculating machines for computations in problems and simulated projects.
d. Personal taxes	
(1) Property taxes	
(2) Social Security tax	. Discuss records kept in home and school and purposes; then relate to business.
(3) Income tax	
3. Cashier Records	
a. Recording receipts	. Relate teacher and/or student experiences involving errors and/or illegibility in records and the consequences.
b. Cash registers	
c. Proof of cash	
d. Daily report	
4. Petty Cash Records	
a. Petty cash vouchers	. Have students compare lists of names and multi-digit numbers for likes and dislikes.
b. Classifying business expenses	
c. Petty cash book	. Throughout the course, use transparencies and/or bulletin boards to present, explain, and/or review forms used.
d. Replenishing the petty cash fund	
5. Banking Records	
a. Opening a checking account	. Use textbook questions and problems for discussion and practice.
b. Making deposits	
c. Endorsements	. Use transparencies of various forms projected on the chalkboard to demonstrate how to fill them in, and have students practice completing them.
d. Writing checks and check stubs	
e. Reconciling the bank statement	
f. Other bank services	. Have students prepare personal and/or family budget.

OutlineActivities

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| <p>6. Sales Records</p> <ul style="list-style-type: none"> a. Sales tickets b. Sales tax c. Charge accounts d. Sales returns e. Statements of account f. Accounts receivable <p>7. Purchases Records</p> <ul style="list-style-type: none"> a. Stock record cards b. Purchase requisitions c. Price quotation cards d. Ordering and receiving merchandise e. Processing invoices f. Accounts payable procedures g. Inventory control | <ul style="list-style-type: none"> . Use simulated project involving family income and expense covering a month. . Discuss records needed for income tax purposes. . Discuss income tax materials from IRS and complete problems. . Use simulated project involving writing receipts, proving cash, and preparing daily report. . Relate the cashier unit to an FBLA fund-raising project. . Invite a manager and a cashier from a local supermarket to discuss qualifications and duties of a cashier and opportunities for advancement. . Complete simulated project involving the petty cash fund. . Secure a speaker from a local bank to discuss banking records and services and/or arrange a tour of a banking firm. . Assign committees to visit various banks to obtain information on procedures for opening and maintaining accounts and give oral reports to class showing forms used. . Secure and use materials and film(s) available from American Bankers Association. . Complete simulated project covering activities from opening a checking account through reconciling the bank statement at the end of the first month. . Complete sales tickets for purchases from information provided by teacher and/or students. |
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OutlineActivities

- . Have students relate experiences as sales clerks in part-time jobs.
- . Complete a simulated project involving charge sales, payments, and returns for a customer for one month, posting to customer's account, and preparing end-of-the month statement.
- . Complete simulated project including activities from time material is requisitioned until it is received, shipment checked, and payment ordered.
- . Emphasize importance of sales and purchases records and stock control records to management. Invite local business representative to discuss this with class.
- . Several of the OJT projects (Gregg) would be appropriate during this first semester of Recordkeeping (Office Cashier, Accounts Receivable Clerk, Accounts Payable Clerk, Stock Control Clerk, for example).

Recordkeeping Semester 2

COURSE DESCRIPTION: This course expands the study of recordkeeping into the areas of payroll, filing, automation, and introduction to the theory of accounting. It is designed to enable the student to develop job-entry skill in single-entry recordkeeping and also may provide foundation for further study in double entry accounting. Adding machines and/or calculators should be available for student use.

PREREQUISITE: Recordkeeping, Semester 1

OBJECTIVES: At the end of study in Recordkeeping, Semester 2, the student will:

1. Demonstrate proper work habits and attitudes.
2. Demonstrate skill and accuracy in computations (manual and/or machine).
3. Demonstrate the ability to compute total hours worked, gross earnings, deductions, and net earnings.
4. Demonstrate an understanding of the various deductions made from earnings.
5. Demonstrate the ability to apply the basic alphabetic rules for filing personal and business names.
6. Demonstrate an awareness of the methods of filing other than alphabetic.
7. Demonstrate an understanding of the purposes of various financial statements, the information each contains, and the use of each by management.
8. Demonstrate an understanding of the role of automation in maintaining financial records and preparing financial reports.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Payroll Records	
a. Time cards	• Use adding and/or calculating machines for computations in problems and simulated projects.
b. Computation of gross earnings	
c. Deductions and net earnings	• Throughout the course, use transparencies and/or bulletin boards to present, explain, and/or review forms used.
d. Payroll	
e. Currency memo	• Use textbook questions and problems for discussion and practice.
f. Employees' earnings records	
g. Payroll tax reports	
2. Filing	
a. Alphabetic filing	• Use transparencies or various forms projected on chalkboard to demonstrate and have students practice filling in the forms.
b. Subject and numeric filing	
c. Other filing methods	
d. Records management	• Have students relate experiences from part-time jobs when applicable to a unit.

Outline

3. Automation (may be integrated with other units where applicable)
 - a. Manual and mechanical data processing
 - b. Punched card
 - c. Electronic
4. Introduction to Accounting
 - a. Accounting equation
 - b. Debits and credits
 - c. Journals and journalizing
 - d. Ledger accounts and posting
 - e. Purchases journal
 - f. Cash payments journal
 - g. Sales journal
 - h. Cash receipts journal
 - i. End-of-period reports
 - (1) Trial balance
 - (2) Income statement
 - (3) Balance sheet
 - j. Accounts receivable and accounts payable

Activities

- . Secure from local businesses forms used in completing the payroll.
- . Complete payroll practice set or simulated project.
- . Use letters and cards from typewriting and transcription classes for filing practice--file alphabetically, then convert to numeric.
- . Visit a local business and observe the filing methods and equipment used.
- . Visit an office supply store to see most up-to-date filing equipment if not seen in visit to local business.
- . Time students on finding list of names and organizations in telephone directory.
- . Use EDL Skillbuilder for filing review.
- . Complete a filing practice set.
- . Have working students describe filing systems and procedures in the offices where they work.
- . Discuss the use of automated and electronic equipment in storage and retrieval of information.
- . Complete a recordkeeping practice set or simulated project covering the operation of a small retail business for a month and including all aspects of financial records covered in Recordkeeping.
- . Emphasize how extensively automated and electronic equipment are used in the maintenance of financial records and the preparation of financial reports and statements. Show film or visit local business to supplement textbook and reference materials.

OutlineActivities

- . Secure punched cards and explain the concept. Use chalkboard diagram and/or transparencies.
- . Visit school data processing center if there is one.
- . List items owned and owed and relate them to the accounting equation.
- . Using the T-account, analyze and record transactions involving the basic principles of the accounting cycle.
- . Discuss the kind of proof that is provided by a trial balance.
- . Solve sample problems, involving working papers, related to the steps in the simple accounting cycle.
- . Several of the OJT projects (Gregg) would be appropriate during this second semester of Recordkeeping (Payroll Clerk, File Clerk, for example).

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. The following methods of evaluation are suggested:

1. Printed tests correlated with the textbook
2. Standardized tests with no reference to a particular text
3. Teacher-made short-answer, essay, and problem-solving tests
4. Observation of class participation and attitude
5. Evaluation of use of business terminology in oral and written assignments and tests
6. Evaluation for neatness and accuracy of completed business forms, records, and transactions
7. Periodic evaluation for accuracy and neatness throughout each practice set and/or simulation

INSTRUCTIONAL MEDIA: The media may include current recordkeeping textbooks, career pamphlets, business forms, transparencies, films, filmstrips, simulated projects, practice sets, programmed materials, and bulletin board displays.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lecture, class discussion, individual and/or committee reports, guest speakers, self-paced instruction, programmed instruction, learning activity packets, and simulation.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDPI NO.: 6212 COURSE TITLE: Shorthand I O.E. CODE: 14.0700

LEVEL: Grades 10, 11, 12 CREDIT: 1 unit LENGTH: 2 semesters

PREREQUISITES: Typewriting I and a working knowledge of English grammar and mechanics as measured by pretest.

First Semester

COURSE DESCRIPTION: This course covers the fundamentals of shorthand. It is designed to develop fluency in reading shorthand plate material and notes rapidly and accurately and the ability to write practiced and pre-viewed dictation and to transcribe meaningful typewritten copy. Primary emphasis is on the presentation and practice of the principles and theory as a foundation for advanced dictation and transcription in later semesters. Typewriters should be available for student use.

OBJECTIVES: At the end of study in Shorthand I, the student will:

1. Recognize sounds, record in shorthand the sounds heard, and read shorthand notes and plates rapidly and accurately
2. Integrate shorthand skill with the development of correct grammatical usage, punctuation, sentence structure, spelling, capitalization, and typewriting
3. Take previewed new-matter dictation at a minimum of 60 words per minute for three minutes and transcribe in typewritten form with at least 95% accuracy
4. Demonstrate desirable personal traits necessary for office employment

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Introduction to Shorthand a. Listening, Reading, and Writing Skills b. Pretranscription Skills c. Developing Good Work Habits d. Career Opportunities	. Pretest for basic English skills and typewriting skill. . Have students use two notebooks, one for homework practice and one for class dictation. Check homework notebook periodically and have students read and then give them practice dictation from homework of two or three days earlier.
2. Theory a. Strokes and Words b. Joining Principles c. Brief Forms d. Phrases e. Word Beginnings and Endings f. Omission of sounds and letters	. Study advertisements requiring shorthand skill. . Distinguish between a secretarial position and other office positions. . Evaluate the importance of shorthand as a salable skill. . Determine local salaries for secretaries.

3. Reading and Writing
 - a. Review of basic elements of shorthand
 - b. Development of speed and accuracy
 - c. Extension of shorthand theory
 4. Dictation
 - a. Familiar material
 - b. Previewed unfamiliar material
 5. Transcription
 - a. Oral
 - b. Typewritten
 - c. Proofreading
 - d. Correcting errors
 - e. Reference materials
 6. Mailable Letters
 - a. Definition
 - b. Elements
 - c. Letter styles
- . Practice desirable work habits such as ability to organize, to follow instructions, and to complete tasks thoroughly, efficiently, and correctly.
 - . Analyze the need for continuing improvement in spelling, punctuation, sentence structure, and letter format.
 - . Read and practice from chalkboard and/or overhead presentation of outlines.
 - . Introduce theory through chalkboard and/or overhead presentation emphasizing phonetic association.
 - . Distinguish between the use of brief form derivatives and regular outline forms.
 - . Read and write shorthand in game activities such as crossword puzzles, bingo, and flash cards.
 - . Read and write from tapes, transparencies, and the controlled reader.
 - . Teacher and student(s) spell and read in unison from shorthand plates, flash cards, transparencies, and/or chalkboard.
 - . Differentiate between "writing" outlines and "drawing" outlines.
 - . Demonstrate proper organization of materials, posture, handwriting positions, position of notebook, and marking of notebook.
 - . Read for short periods from textbook plates, controlled reader, homework notes, and class dictation.
 - . Complete reading and writing practices on theory principles.
 - . Take dictation from practiced and previewed material and transcribe orally.
 - . Take dictation for short periods of time of previewed new material and transcribe in typewritten form.

- . Use multi-channel lab for dictation speed-building to fit individual student needs.
- . Review and refine proofreading and correcting skills developed in type-writing classes.
- . Use reference materials for word division and other transcription problems.
- . Review letter styles, placement, and parts.
- . Differentiate between mailable and unmailable letters.

Second Semester

COURSE DESCRIPTION: This course is designed to review and to build on the fundamentals of shorthand and to develop fluency in writing shorthand notes rapidly and accurately from previewed new-matter dictation. Emphasis is placed on the development of correct machine transcription techniques and the production of typewritten mailable copy. Typewriters should be available for student use.

OBJECTIVES: At the end of study in Shorthand II, the student will:

1. Demonstrate mastery of shorthand theory
2. Expand shorthand vocabulary.
3. Take previewed new-matter dictation at a minimum of 80 words per minute for three minutes and transcribe mailable typewritten copy
4. Demonstrate acceptable transcription techniques
5. Use appropriate reference materials efficiently when transcribing
6. Demonstrate the ability to follow instructions
7. Demonstrate desirable attitudes and traits acceptable in the secretarial profession

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Theory Review	
a. Word beginnings and endings	. Review theory systematically through chalkboard and/or overhead presentation of outlines.
b. Principles of joining	
c. Omission of sounds and letters	. Continue use of two notebooks as in Shorthand I - one for homework practice and one for classwork dictation.
d. Phrasing	
e. Brief forms and brief form derivatives	. Reinforce skills through reading and writing shorthand outlines.
f. Most-used words	

2. Reading
 - a. Reading for content
 - b. Reinforcement of shorthand outlines and principles
 - c. Increasing rate of reading from shorthand notes
 3. Speed and Accuracy in Dictation
 - a. Familiar material
 - b. Unfamiliar material with previews
 - c. Shortcuts in taking dictation
 - d. Extension of shorthand theory
 4. Speed and Accuracy in Transcription
 - a. Refinement of spelling, punctuation, and English usage
 - b. Proofreading
 - c. Correcting errors
 - d. Judgment placement of typewritten copy
 - e. Carbon copies
 - f. Review of secretarial reference materials
 - g. Special transcription problems
 - h. Letter styles
 5. Attitudes and Work Habits
 - a. Personal pride in quality work
 - b. Desire to produce mailable copy
 - c. Following instructions
- . Compare reading rate from shorthand copy with that from longhand copy and set increasingly higher percentage goals.
 - . Interpret transcribed notes as to content and meaning.
 - . Use multi-channel laboratory for dictation practice to fit individual student needs.
 - . Take dictation at increasingly higher speeds for longer periods of time on familiar and previewed unfamiliar material.
 - . Proofread and correct errors in spelling, punctuation, grammar and typewriting using a variety of references.
 - . Practice error correction using a variety of correction materials.
 - . Discuss the characteristics of mailable copy, using actual letters as examples.
 - . Improve shorthand techniques through individualized instruction using tapes and/or other types of media.
 - . Give students timed practice on letter parts to decrease waste of time in transcription.
 - . Use judgment placement in transcribing shorthand notes into mailable copy.
 - . Practice intensively on dictation material containing the 1500 most frequently occurring words in business correspondence.
 - . Discuss the importance of producing work of mailable quality.
 - . Discuss effect of mailable copy on reader as compared with that of unmailable copy.
 - . Use role playing to practice following instructions.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A few of these methods include the following:

1. Written recognition of students' shorthand outlines written from dictation
2. Typewritten transcripts evaluated on mailability
3. Oral reading tests
4. Timed transcription tests evaluated on speed and percent of error
5. Reading and transcribing on the typewriter from selected homework assignments
6. Evaluation of promptness, neatness, accuracy, and legibility in assigned work
7. Observation of work habits and attitudes

INSTRUCTIONAL MEDIA: The media used may include current shorthand textbooks, supplementary shorthand dictation books, workbooks, transparencies, films, filmstrips, cassettes, tapes, records, shorthand charts and posters, dictionaries, stenographic reference books, bulletin boards, games, individualized learning packets (commercially and/or teacher prepared), and the multi-channel laboratory.

INSTRUCTIONAL APPROACHES: Instructional approaches may include a combination of individual and group activities using a variety of techniques. These techniques may include resource persons, individually prescribed instruction, repetitive practice, programmed materials, learning activity packages, teacher and student demonstrations, and role playing.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII, Facilities, Equipment, and Supplies.

SDPI NO.: 6213 COURSE TITLE: Shorthand II O.E. CODE: 14.0700
 LEVEL: Grades 11 and 12 CREDIT: 1 unit LENGTH: 2 semesters
 PREREQUISITES: Typewriting I, Shorthand I

First Semester

COURSE DESCRIPTION: This course is designed to further refine skills in shorthand, typewriting, and language arts, and to apply these skills in the production of mailable typewritten transcripts. Emphasis is placed on developing the ability to take dictation of previewed new material at increasingly higher speeds for longer periods of time and to transcribe mailable copy at acceptable job-entry rates. Typewriters must be available for student use.

OBJECTIVES: At the end of study in Shorthand II, first semester, the student will:

1. Take previewed new-matter dictation at a minimum of 90 words per minute for three minutes and transcribe mailable typewritten copy at a minimum of 10 words per minute
2. Take office-style dictation and make indicated corrections
3. Integrate shorthand skills with acceptable secretarial procedures
4. Use judgment in copy placement
5. Use the dictionary and other reference material with increased proficiency
6. Follow instructions explicitly, expressed and implied
7. Demonstrate personal traits and attitudes acceptable in the secretarial profession

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Refinement of Dictation a. Familiar material b. Unfamiliar material c. Phrasing d. Special abbreviations e. Shortcuts f. Extending scope of vocabulary	. Use overhead projector for theory review a few minutes each day. . Take dictation at increasingly higher speeds for longer periods of time on previewed unfamiliar material for a major portion of each class period and transcribe orally.
2. Office-Style Dictation a. Problems b. Solutions	. Use multi-channel laboratory for dictation practice to suit individual student needs.
3. Refinement of Transcription a. Mailable copy b. Multiple carbons c. Duplicating processes d. Figures, addresses, and dates e. Mailing lists	. Refine phrasing, special abbreviations, and shortcuts through intensive practice. . Discuss office-style dictation procedures.

4. Refinement of Work Habits

- a. Working without specific directions and supervision
 - b. Neatness and orderliness
 - c. Flow of work
 - d. Using dictionaries and other reference materials
 - e. Proofreading and corrections
- . Take office-style dictation from tapes and from business persons.
 - . Practice taking dictation with interruptions and changes.
 - . Transcribe meaningful typewritten copy from office-style dictation notes.
 - . Have students take dictation from various sources such as other students, resource persons, tapes, and records.
 - . Vary terminology in dictated material, i.e. legal, medical, insurance, real estate, and statistical.
 - . Give students timed practice on letter parts to increase transcription rates.
 - . Transcribe the day after dictation is given.
 - . Have students proofread each other's transcripts and evaluate for readability.
 - . Practice transcribing with multiple carbons using carbon copy notations.
 - . Transcribe form letter from shorthand notes; type on master and duplicate; fill in date, inside address, and salutation from a mailing list, and prepare for mailing.
 - . Use simulated projects with less specific directions.
 - . Use role playing to demonstrate the advantages of good work habits.
 - . Practice work habits, attitudes, and traits necessary in the business office.
 - . Have currently employed students share job experiences.

Shorthand II Semester 2

COURSE DESCRIPTION: This course provides refinement of shorthand skills and their integration with other types of secretarial procedures. Emphasis is on the further development of dictation and transcription skills and of desirable work habits, attitudes, and character traits necessary for employment in a business office. Typewriters must be available for student use.

OBJECTIVES: At the end of study in Shorthand II, second semester, the student will:

1. Take previewed new-matter dictation at a minimum of 100 words per minute for three minutes and transcribe mailable typewritten letters at a minimum of 15 words per minute with carbon copies and envelopes
2. Assemble originals, carbon sheets, second sheets, and envelopes correctly and efficiently
3. Use judgment in copy placement
4. Take office-style dictation and transcribe mailable typewritten letters at a minimum of 10 words per minute with carbon copies and envelopes
5. Take dictation of business reports and minutes and transcribe usable copy
6. Integrate shorthand skills with acceptable secretarial procedures
7. Demonstrate desirable attitudes, ideals, and traits representative of the secretarial employee.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Skill Development	
a. Theory Review	. Take dictation on progressively difficult material at increasingly higher speeds for longer periods of time on previewed new material.
b. Increased length and difficulty of dictation	
c. Vocabulary extension	
d. Dictation from various sources	. Give students timed practice on letter parts to increase transcription rates.
e. Perfection of transcription skill	
f. Office-style dictation	. Transcribe the day after the dictation is given
g. Correction techniques	
2. Skill Integration	
a. Fusion of shorthand, typing, and language arts skills	. Have students take dictation from various sources such as other students, resource persons, tapes, and records.
b. Techniques, work habits, and attitudes	. Complete integrated projects.
c. Simple and complex tasks	. Solve error-correction problems using a variety of methods and devices.
d. Decision making	
e. Minutes of business meetings	

- f. Business reports
 - g. Deadlines
 - h. Priorities
3. Specialized Dictation/Transcription
 - a. Medical
 - b. Legal
 - c. Executive
 - d. Technical
 4. Preparation for Employment
 - a. State and Federal civil service examination
 - b. Local business employment
 - c. Local job-entry requirements
- . Practice taking minutes and taking dictation of business reports and producing usable transcripts.
 - . Use simulated projects to practice decision making and determining priorities.
 - . Complete dictation/transcription projects using specialized vocabulary.
 - . Have medical and/or legal secretary speak to class.
 - . Study local employment tests and job-entry requirements through interviews conducted in the business community.
 - . Review sample civil service exams and determine levels of competencies required for government employment.
 - . Take Civil Service Examinations (State and Federal)

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A few of these methods include the following:

1. Timed transcription from timed dictation evaluated on basis of speed
2. Typewritten transcripts evaluated on basis of mailability
3. Integrated projects
4. Simulated projects
5. Employment tests - Civil Service and business
6. Observation of regular, rapid, and accurate use of reference materials
7. Evaluation of promptness, neatness, accuracy, and legibility in assigned work
8. Observation of techniques, work habits, and attitudes

INSTRUCTIONAL MEDIA: The media may include shorthand textbooks, supplementary dictation materials, multi-channel laboratory, transparencies, films, filmstrips, cassettes, tapes, records, shorthand charts and posters, dictionaries, secretarial reference books, bulletin boards, games, and individualized learning packets (commercially and/or teacher prepared).

INSTRUCTIONAL APPROACHES: Instructional approaches may include a combination of individual and group activities using a variety of techniques.

These techniques may include repetitive practice, dictation by resource persons, office style dictation, office simulations, integrated projects, programmed instruction, individual progress method, learning activity packages for English skills, teacher and student demonstrations, role playing, and on-the-job work experience.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII, Facilities, Equipment, and Supplies.

SDPI NO.: 6633 COURSE TITLE: Simulated Office O.E. CODE: 14.9900
Training

COURSE DESCRIPTION: This course is designed for those schools unable to support a two-hour block course. It enables the student to develop and improve office technical skills, work habits, human relations, and personal qualities necessary for employment in a business office. Areas of instruction include the functions of the office, interpersonal relations, payroll systems, sales and accounts receivable systems, purchases and accounts payable systems, word processing skills and concepts, written communications, and job simulations. Review and refinement of communication, computational, and typewriting skills are integrated with other instructional units through the use of simulated projects.

LEVEL: 12 CREDIT: 1 unit LENGTH: 1 year

PREREQUISITES: Office Occupations I

OBJECTIVES: At the end of study in Simulated Office Training the student will:

1. Employ correct spelling, grammar, and punctuation in composing and typing business correspondence, reports and business forms.
2. Express written ideas in letters, memos, and reports so that they meet office standards of usability through the use of transcribers, typewriters, and other media.
3. Demonstrate the ability to meet office production standards in typing letters, reports and business forms while working under pressure of time, interruptions, noise, and changing priorities.
4. Place and answer telephone calls that give and receive business information that is complete and in acceptable business form.
5. Process data and identify terms used in payroll, purchases, accounts payable, sales, and accounts receivable systems.
6. Demonstrate the ability to follow oral or written instructions correctly.
7. Decide the appropriate process of reproduction in terms of product, cost and use of copies.
8. Demonstrate the ability to store and retrieve information using at least four filing systems.
9. Decide upon appropriate systems of record management and make recommendations for change when given problem situations.
10. Exhibit interpersonal skills and etiquette that are acceptable in business.

11. Correctly complete at least two job simulations.
12. Identify work priorities in order to plan and organize work accordingly.
13. Develop job skills and knowledges necessary to secure a job in a business-related field.
14. Communicate ideas effectively to individuals and/or groups.
15. Demonstrate acceptable work attitudes and behavior.
16. Handle materials and equipment in a responsible manner.
17. Maintain appropriate personal hygiene and appearance acceptable for the business office.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Review of Employment Procedures	. Diagnose weaknesses of students during a mock interview. Make appropriate suggestions for improvement.
2. Office Efficiency a. Human relations b. Personality c. Teamwork	. Discuss how human relations affect job performance and morale. . Discuss case studies involving human relations. . Develop display posters depicting office efficiency. . Develop skits illustrating poor and productive office efficiency. . Type summaries and discuss magazine articles dealing with team effort and human relations. . Invite an office manager to discuss the importance of teamwork. . Observe team effort in the school office. Report findings to class. . Discuss reasons people are promoted other than educational background.

OutlineActivities

3. Records Management Control

- a. Review of filing procedure
- b. Management of records system
- c. Micrographics
- d. Electronic data processing storage and retrieval systems

- . Outline and type desirable personality traits.

- . Visit a local business to determine the number of filing methods used.

- . Show examples of special files used by local businesses.

- . Develop a filing system for a restaurant.

- . Discuss the advantages of using microfilming and microfiche.

- . Invite speaker to explain how electronic data processing equipment affects the storage and retrieval of information.

4. Word Processing Skills Development

- a. Machine transcription
- b. Giving and taking dictation
- c. Work scheduling
- d. Rough draft revisions and formatting
- e. Letter composition, outlines and reports
- f. Office stationery
- g. Appropriate process of copying and duplicating
- h. Word processing job simulation

- . Develop transcription proficiency through rotation on transcribing machines.

- . Design individualized remedial and enrichment drills depending upon student transcription weaknesses.

- . Compare the method of handling correspondence in a company having a word processing center and one without a center.

- . Develop outlines for the preparation of dictating correspondence.

- . Have students dictate letters to each other for transcribing.

- . Type correspondence from rough draft copy.

- . Maintain daily job logs of work performed by student.

- . Observe an office worker and then develop a work schedule for that worker.

Outline

5. Purchases and Accounts Payable Systems
 - a. Function of purchases
 - b. Budgeting
 - c. Requisitioning
 - d. Ordering
 - e. Receiving
 - f. Handling accounts payable
 - g. Remittance, claims and adjustment letters
 - h. Purchases/accounts payable job simulation

Activities

- . Prepare a bulletin board illustrating types of word processing equipment.
- . Secure price lists of office stationery, supplies, and equipment, and duplicating equipment.
- . Read magazine articles and advertisements about types of copying and duplicating equipment on the market.
- . Decide appropriate duplication method for assigned projects and materials.
- . Compose and type a report about available dictating equipment.
- . Complete word processing job simulation.
- . Discuss types of purchasing budgets and the dependency of purchases on sales.
- . Prepare a budget for a retail store selling records.
- . Type requisitions and purchase orders for purchasing records.
- . Compare purchase orders with receiving reports.
- . Compose and type letters dealing with adjustment and claims.
- . Discuss the relationship of purchases to accounts payable.
- . Record pertinent data in accounts payable ledgers.
- . Complete purchases/accounts payable job simulation.

OutlineActivities

- | | |
|--|--|
| <p>6. Sales and Accounts Receivable Systems</p> <ul style="list-style-type: none"> a. Customer contact <ul style="list-style-type: none"> (1) Sales letter (2) Telephone communications b. Processing orders c. Billing d. Customer complaints e. Recording sales f. Preparing statements, acknowledgments, credit, and collection letters g. Sales and accounts receivable simulation | <ul style="list-style-type: none"> . Role play situations involving customer contact. . Compose and type sales promotion letters. . Discuss methods of checking a customer's credit. . Invite speaker from credit bureau to discuss the importance of a good credit rating. . Prepare invoices for a group of purchase orders. . Record pertinent information in accounts receivable ledger. . Complete sales/accounts receivable job simulation. |
| <p>7. Payroll Systems</p> <ul style="list-style-type: none"> a. Methods of payment b. Payroll data c. Preparing the payroll d. Payroll job simulation | <ul style="list-style-type: none"> . Discuss the effects of government regulations upon payroll procedures. . Examine tables of deductions and do practice exercises. . Complete a simulated payroll project. |
| <p>8. Job Simulations</p> <ul style="list-style-type: none"> a. Legal typist b. Corresponding secretary c. Administrative assistant d. Medical typist e. Real estate clerk f. Insurance clerk g. Others | <ul style="list-style-type: none"> . Complete job simulations to meet career objectives of students. |

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. A number of these methods include:

1. Printed tests correlated with the textbook(s).
2. General standardized tests.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Evaluation of oral participation, discussion, homework, and attitudes
5. Checklist of promptness, neatness, and accuracy in all assigned work.
6. Business simulations and projects.

INSTRUCTIONAL MEDIA: The media may include textbooks, supplementary books, pamphlets, workbooks, transparencies, films, filmstrips, cassettes, reference manuals, dictionaries, bulletin boards, integrated projects, and job simulations.

INSTRUCTIONAL APPROACHES: Instructional approaches may include field trips, guest speakers, practice sets, business simulations (in-basket, unipack, task, model office, teacher prepared), integrated projects, career-related projects, self-paced instruction, work experience, learning activity packages (commercially and teacher prepared), quest projects, and rotations.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII of this guide.

SDPI NO.: 6111 COURSE TITLE: Typewriting I O.E. CODE: 14.0900
 LEVEL: Grades 9, 10, 11, 12 CREDIT: 1 unit LENGTH: 2 semesters
 PREREQUISITES: None

First Semester

COURSE DESCRIPTION: This course is designed to develop the ability to operate the typewriter correctly and efficiently using the touch method. The fundamentals of typewriting are the same regardless of ultimate usage. In this first semester of typewriting, students learn to arrange in typewritten form problem copy such as tabulations, business and personal letters, reports, manuscripts, and outlines. Typewriting is a highly desirable tool for rapid and efficient written communication; therefore, special emphasis is given to word division, spelling, punctuation, capitalization, numbers, and symbols.

OBJECTIVES: At the end of study in Typewriting I, first semester, the student will:

1. Correctly use the operative parts of the typewriter
2. Demonstrate correct body position and proper typewriting techniques
3. Master the entire keyboard by the touch method
4. Demonstrate mastery of the techniques for proofreading and correcting errors
5. Demonstrate the ability to arrange simple problem copy (business and personal letters, tabulations, manuscripts, outlines, and rough drafts) in correct typewritten form using vertical and horizontal centering
6. Demonstrate desirable personal traits of an office employee
7. Analyze errors and select appropriate remedial drills
8. Keep work area neat and clean and materials and supplies in order
9. Given multiple opportunities, type from straight copy three 3-minute timings at a minimum gross rate of 20 words per minute with no more than six errors

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Fundamentals a. Equipment b. Furniture c. Techniques	• Review operative parts of the typewriter through illustrated charts and through teacher and student demonstrations.
2. Skill Development a. Touch method b. Keyboard mastery c. Manipulation of machine parts d. Speed, accuracy, and error correction	• Demonstrate proper care of the typewriter and organization of work area by setting up a model desk. • Demonstrate the use and location of teacher-prepared file folders in which students are expected to store their supplies.

3. Performance
 - a. Quality
 - b. Quantity
 4. Introduction to Typewriting Applications
 - a. Centering
 - b. Tabulation
 - c. Letters and Envelopes
 - d. Reports
 - e. Manuscripts
 - f. Composition at the Typewriter
- . Outline procedure for reporting needed repairs.
 - . Give objective pretest on fundamentals of typewriting.
 - . Emphasize correct typewriting techniques through use of
 - a. films
 - b. teacher demonstrations
 - c. student demonstrations (video-taped)
 - d. technique checklist for students
 - . Through speed and accuracy drills, check student techniques for remedial action.
 - . Emphasize the importance of error diagnosis by
 - a. acquainting students with different types of errors
 - b. having students check and analyze errors on typewritten drill's and timed writings
 - c. providing supplementary drill exercises for remediation of commonly made errors
 - . Obtain and analyze different examples of typewritten copy.
 - . Type drills from teacher dictation and from teacher-made or commercially prepared tapes.
 - . Practice horizontal and vertical centering in the production of typewritten problems.
 - . Compose and edit short paragraphs and letters at the typewriter.
 - . Use supplementary drills and exercises in practicing proofreading techniques.
 - . Through the use of charts, textbook illustrations, and transparencies, familiarize students with letter styles, envelopes, reports, and manuscripts.
 - . Prepare material in proper typewritten form from rough-draft copy.

Typewriting I
Second Semester

COURSE DESCRIPTION: This course is designed to continue the development of basic typewriting skills with concentrated application of these skills to the production of business correspondence, forms, and reports.

OBJECTIVES: At the end of study in Typewriting I, second semester, the student will:

1. Demonstrate ability in manipulating all machine parts
2. Type numbers and symbols by touch
3. Demonstrate correct form and placement of business letters and envelopes
4. Assemble and type carbon copies correctly and neatly
5. Arrange and type letters in a variety of acceptable styles
6. Identify and use proofreaders' symbols
7. Proofread and make neat corrections
8. Identify and apply basic punctuation, numeric, and grammar rules
9. Demonstrate ability to compose at the typewriter
10. Organize work station for performing tasks efficiently
11. Arrange and type manuscripts in acceptable form
12. Type from rough draft, statistical, handwritten, and unarranged copy
13. Solve problem situations and make wise decisions in producing mailable copy
14. Reproduce copies using stencil and fluid processes
15. Demonstrate ability to type job applications
16. Demonstrate desirable work habits
17. Given multiple opportunities, type from straight copy three 5-minute timings at a minimum gross rate of 30 words per minute with no more than five errors
18. Type letters in mailable form with envelopes at a minimum rate of 10 words per minute.

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Improving Basic Typing Skills a. Speed and Accuracy b. Techniques c. Statistical Typing	. Administer a typewriting skill test to analyze techniques and determine rates. . Videotape students' typewriting performance and analyze techniques.
2. Letter Mechanics a. Business Letters (1) Styles (2) Punctuation (3) Parts (4) Mailability	. Through the use of teacher dictation and tapes, type numbers by touch method. . Complete a technique checklist for student self-evaluation. . Diagnose causes of errors and practice appropriate remedial exercises.

- b. Envelopes
 - (1) Return address
 - (2) Addressing small, large, and window envelopes
 - (3) Two-letter state abbreviations and zip codes
 - (4) Special mailing notations
 - (5) Folding and inserting letters
 - 3. Stationery and Supplies
 - a. Size
 - b. Quality
 - c. Ordering supplies
 - d. Carbon paper
 - 4. Miscellaneous Correspondence
 - a. Form letters
 - b. Two-page letters
 - c. Interoffice memoranda
 - d. Tables in letters
 - 5. Business Forms
 - a. Intra-Company
 - b. Purchase Requisition
 - c. Purchase Order
 - d. Invoice
 - e. Bill of Lading
 - f. Others
 - 6. Composing at the Typewriter
 - a. Short answers
 - b. Paragraphs
 - c. Short Essays
 - d. Letters
 - 7. Manuscript Typewriting
 - a. Reports
 - b. Manuscripts with references
 - 8. Tables
 - a. Vertical and horizontal placement
 - b. Open and ruled
 - 9. Language Arts Skills
 - a. Grammar
 - b. Punctuation
 - c. Capitalization
 - d. Word Division
 - e. Spelling
- . Use controlled reader to build speed and accuracy based on individual student needs.
 - . Using visual aids, review letter styles, tabulation, outlines, manuscripts, typewriting from rough drafts and script, and business forms.
 - . Assign students to prepare bulletin board displays illustrating mailable and unmailable business letters and envelopes.
 - . Complete letter and envelope simulation project.
 - . Collect sample business forms from business firms.
 - . Compose paragraphs, short essays, and letters at the typewriter. Have students proofread individually and as a team.
 - . Type from dictation demonstrating language arts skills. Utilize reference materials in editing typewritten copy.
 - . Type manuscripts and simple reports from text problems.
 - . Discuss and demonstrate procedures for preparing master units and stencil and operating duplicating equipment.
 - . Discuss cost, quantity, and quality of reproducing copies.
 - . Have students type and duplicate forms needed in school, school announcements, and/or a booklet containing student work with illustrations.
 - . Have students answer questions on job opportunities selected from reference sources available.
 - . Compose and type letters of application and personal data sheets.
 - . Complete simulated applications forms and employment tests.

10. Proofreading and Typewriting .
 from Rough Drafts
 a. Typewritten
 b. Handwritten
11. Duplicating
 a. Typing on Fluid Masters
 b. Typing on Stencils
 c. Others
12. Correction Techniques
 a. Eraser
 b. Correction Tape
 c. Correction Fluid
 d. Others
13. Job Application
 a. Letter of Application
 b. Personal Data Sheet
 c. Application Forms
 d. Employment Tests

EVALUATION: Various techniques should be employed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Some of these methods include:

1. Printed tests correlated with the textbook
2. Standardized tests with no reference to a particular textbook
3. Teacher-made short-answer and performance tests
4. Typewritten problems prepared in class
5. Observation of promptness, neatness, accuracy, and legibility in assigned work
6. Accuracy and speed in straight-copy typewriting
7. Evaluation of typewritten problems on the basis of mailability

INSTRUCTIONAL MEDIA: The media used may include current text materials, drill books, workbooks, transparencies, films, filmstrips, cassettes, charts and posters, dictionaries, bulletin board displays, reference materials, and individualized learning packets (commercially and/or teacher-prepared).

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include repetitive practice, job instruction sheets, individually prescribed instruction, learning activity packages, programmed instruction, and teacher and student demonstration. See also pages 33-34 of this guide.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

SDP NO.: 6112 COURSE TITLE: Typewriting II O.E. CODE: 14.0900
 LEVEL: Grades 10, 11, 12 CREDIT: 1 unit LENGTH: 2 semesters
 PREREQUISITES: Typewriting I

First Semester

COURSE DESCRIPTION: This course provides additional practical problem-solving experiences in the preparation of advanced reports, correspondence, tables, and forms. Concentration on the solution of typewriting problems is stressed to improve production rate in daily work situations. Units of instruction are designed to meet individual levels of competency.

OBJECTIVES: At the end of study in Typewriting II, first semester, the student will:

1. Demonstrate speed and accuracy in producing typewritten copy necessary for on-the-job performance
2. Demonstrate sustained production skill in the typewriting of business materials
3. Compose usable copy at the typewriter
4. Organize and type reports and manuscripts with and without footnotes
5. Demonstrate skill in duplicating, using various processes such as spirit, stencil, offset, and photocopy
6. Proofread materials accurately and make neat corrections to produce mailable copy
7. Demonstrate ability to cope with pressure, to complete multiple tasks, and to work with interruptions
8. Follow directions, both oral and written
9. Transfer information from source documents to business forms correctly
10. Demonstrate desirable personal qualities and attitudes necessary for office employees
11. Given multiple opportunities, type from straight copy three 5-minute timings at a minimum rate of 35 words per minute with no more than four errors
12. Type letters with special lines in mailable form with carbon copy and envelopes at a minimum rate of 12 words per minute

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Typewriting Production Skill	• Give a typewriting skill test to analyze techniques and to determine student typewriting rates.
a. Organization of Work Area	
b. Proofreading and Correcting Errors	• Demonstrate the use and location of teacher-prepared file folders in which students are to store their supplies.
c. Mailable Copy	
d. Review of Basic Techniques	

2. Business Letters with Multiple Copies
 - a. Business letters review
 - b. Punctuation review
 - c. Special letter styles
 - d. Special-size stationery
 - e. Production
 3. Business Forms Review
 - a. Types
 - b. Timed Production
 4. Tabulation
 - a. Types and Placement
 - b. Open, Ruled, and Boxed
 - c. Financial Reports
 - d. Timed Production
 5. Manuscripts and Rough Drafts
 - a. Manuscripts with and without Footnotes
 - b. Roughdrafts - type-written and handwritten
 - c. Timed Production
 6. Reprographics
 - a. Fluid Duplicator
 - b. Stencil mimeograph
 - c. Offset
 - d. Photocopier
 - e. Others
- . Explain the use and location of supplies and materials available for students.
 - . Have students use a "sign-out sheet" for all supplies used in order to stress office economy.
 - . Stress importance of returning supplies to their proper location.
 - . Stress a good attitude for cooperation in maintaining an efficient classroom.
 - . Outline procedure for reporting needed repairs.
 - . Review proofreader's marks and demonstrate methods of making acceptable corrections.
 - . Practice applications of proofreading, proofreader's marks squeezing and spreading letters, and word division.
 - . Prepare transparencies of actual business letters to illustrate letter styles, parts, principles of letter-writing, and mailability.
 - . Obtain and discuss various types and sizes of business letter stationery.
 - . Follow a production skillbuilding cycle: learning/untimed; skill-building/timed; measurement/timed.
 - . Have students compile individual office manuals to include examples of various business letters, reports, and forms.
 - . Assign students to prepare a bulletin board display of various business letters, reports, and forms.
 - . Apply the rules of vertical and horizontal centering to advanced tabulation problems.
 - . Using advanced composition skills, arrange and type manuscripts with footnotes, title page, and bibliography.

- . Have students compose and type a one-page manuscript on the free enterprise system.
- . Apply techniques of tabulation to the typewriting of financial reports such as the reconciliation of bank statement, income statement, and balance sheet.
- . Have a company representative demonstrate duplication processes.
- . Demonstrate different types of duplicating equipment and relate the materials used with each type. Discuss cost, quantity, and quality of copies.
- . Use a duplication project such as a form letter to be sent to a mailing list.
- . Have students engage in in-basket activities to develop decision-making skills and to develop coping skills in working under pressure.

Typewriting II Semester 2

COURSE DESCRIPTION: This course is designed to refine typewriting and language art skills through application in realistic projects in a variety of task and job simulations. Emphasis is given to the development of decision-making skills. **PREREQUISITE:** Typewriting II, Semester 1

OBJECTIVES: At the end of study in Typewriting II, second semester, the student will:

1. List and discuss the qualifications necessary for office personnel
2. Use reference manuals and resource materials efficiently
3. Apply language arts skills in problem solving
4. Adapt transcription skills to word processing environments
5. Type correspondence and reports in mailable form
6. Spell and define vocabulary words indicative of a particular occupational area
7. Follow oral and written instructions
8. Make priority work decisions
9. Demonstrate skills in language arts, proofreading, editing, and effective management of time.
10. Produce mailable typewritten copy from rough draft and handwritten material
11. Compose and prepare in mailable typewritten form responses to business correspondence, given general instructions as to content of reply
12. Given multiple opportunities, type from straight copy three 5-minute timings at a minimum rate of 40 words per minute with no more than three errors
13. Type letters with special lines in mailable form with carbon copy and envelopes at a minimum rate of 15 words per minute

CONTENT OUTLINE AND SAMPLE TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Typewriting Applications	. Give typewriting skill tests to determine student typewriting rates.
2. Production Typewriting	. Set up a model desk with materials and supplies arranged in efficient manner.
3. Integrating Language Arts Skills	
4. Word Processing	. Have students use a "sign-out sheet" for all supplies used in order to stress office economy.
5. Completing Office Forms	
6. Simulated Office Jobs	. Pretest using rough draft correspondence which needs punctuation, capitalization, spelling corrections, and correct word usage.
a. Clerk-Typist	
b. Receptionist	
c. General Office Clerk	
d. Legal Typist	
e. Statistical Typist	. Demonstrate equipment in the classroom, using transparencies if available.

- . Have currently employed students talk to class about qualifications necessary for office employment.
- . Through the use of job instruction sheets and programmed instructional material, have students complete assigned tasks related to equipment available in the laboratory.
- . Have students verify (using adding machines and/or calculators) and produce mailable typewritten copy from rough draft financial statements and statistical reports.
- . Discuss the word processing cycle and systems based on assigned readings.
- . Take a field trip to a word processing center.
- . Have students compose responses to letters previously recorded on the transcription machine whereby language skills can be measured.
- . Set up a reference and resource materials center in the laboratory for student use.
- . Have students complete in-basket projects and practice sets as related to various office jobs. Include several tasks requiring students to organize work in priority order.
- . Through the use of teacher-prepared contracts and simulation projects, rotate students through various office jobs. Include several tasks requiring students to organize work flow.
- . Emphasis should be given to development of production typewriting skills rather than straight-copy speed development.

EVALUATION: Various techniques should be employed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. Some of these methods include:

1. Printed tests correlated with the textbook
2. Standardized tests with no reference to a particular textbook
3. Teacher-prepared short-answer and performance tests
4. Typewritten problems prepared in class evaluated on mailability
5. Observation of promptness, cooperation, and work habits
6. Production of in-basket and simulated exercises
7. Completion of typewriting projects brought in from other teachers, the principal, etc.
8. Accuracy and speed in straight-copy typewriting

INSTRUCTIONAL MEDIA: The media used may include current text materials, drill books, workbooks, transparencies, films, filmstrips, cassettes, charts and posters, dictionaries, bulletin board displays, reference materials, resource speakers, and individualized learning packets (commercially and/or teacher-prepared).

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include repetitive practice, job instruction sheets, individually prescribed instruction, learning activity packages, programmed instruction, and teacher and student demonstration. See also pages 33-34 of this guide.

FACILITIES, EQUIPMENT, AND SUPPLIES: Refer to Section VIII, Facilities, Equipment, and Supplies.

SDPI NO.: 6422 COURSE TITLE: Word Processing O. E. CODE: 14.0400

COURSE DESCRIPTION: This course provides a thorough background of word processing concepts, communication skills, mechanical skills, and career opportunities. Integrated and simulated projects cover language arts, decision making, problem solving, dictation, machine transcription, and the proportional spacing typewriter.

LEVEL: Grades 11, 12 CREDIT: 1 Unit LENGTH: 2 Semesters

PREREQUISITE: Typewriting I

OBJECTIVES: At the end of study in Word Processing, Semester 1, the student will:

1. Demonstrate an understanding of word processing concepts and applications in business, industry, and government.
2. Demonstrate an understanding of word processing terminology.
3. Use correct procedures to dictate business letters onto tape from printed or handwritten copy.
4. Use correct procedures to compose and dictate acceptable business letters onto tape without prior written form.
5. Transcribe business correspondence and reports from prerecorded media in mailable form at a rate acceptable for job entry.
6. Set priorities for performing tasks.
7. Demonstrate decision-making and problem-solving abilities.
8. Demonstrate desirable personal traits necessary for employment in the communications area.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Introduction a. Evolution and definition b. Concepts, goals, and advantages c. Tradition vs modern d. Applications e. Terminology f. Career opportunities	. Discuss evolution of word processing as related to a technical society. . Compose and discuss several informal definitions of word processing. . In class discussion contrast the traditional office structure and the modern word processing system.
2. Language Arts Skills a. English usage b. Punctuation c. Composition d. Vocabulary e. Word division f. Spelling	. Have students visit offices in the area to observe whether modern or traditional and report to class. Discuss from aspect of cost and efficiency.

Outline

3. Recording and Originating Skills
 - a. Input equipment
 - b. Verbal input techniques
 - c. Evaluation of dictated material
4. Transcribing Skills
 - a. Equipment
 - b. Techniques
 - (1) Letters and memos
 - (2) Proofreading and editing
 - (3) Form letters
 - (4) Reports

Activities

- . Invite a local business representative to discuss the concepts, goals, and advantages of word processing in his business operation.
- . Practice the use of transcribing equipment using commercial or teacher prerecorded material.
- . Have each student practice the use of transcribing equipment using material he or she has prerecorded and material dictated by another student.
- . Use flash cards to drill on proofreader's marks.
- . Proof and edit transcribed material, using proofreader's marks.
- . Emphasize the necessity for mailability in final copy.
- . Have each student proof and edit copy transcribed by another student and return to original transcriber for final typing.
- . Have each student practice typing final copy from copy proofread and edited by another student.
- . Discuss the use of form letters, or repetitive correspondence.
- . Have students bring to class advertisements of employment opportunities in the field of word processing and discuss requirements.
- . Pretest students to determine level of competence in each area of language arts. Use individually prescribed programmed material as needed to bring language arts skills to acceptable level of competence.

OutlineActivities

- . Follow a plan to construct sentences and paragraphs, such as: PLAN, PRODUCE, PRUNE, POLISH.
- . Compose business letters for given situations; critique and revise.
- . Practice the use of dictation equipment using letters composed in the language arts unit.
- . Discuss the essential parts of a message and of a report and prepare an outline to follow when composing.
- . Discuss importance of having all materials necessary for dictating - letter to be answered, names, and addresses, necessary files.
- . Practice dictating onto tape from printed and handwritten copy.
- . Practice using dictation equipment, composing and dictating without prior written form. Begin with short, simple messages and gradually increase the length and complexity.
- . Use check list to evaluate voice pattern for pace, articulation, volume, and quality.
- . Use check list to evaluate language pattern for verb usage, topic sentences, conciseness, and clarity.
- . Use check list to evaluate thought pattern for sequence of thought.
- . Have each student evaluate his or her own dictation and that of another student.
- . Discuss the operating features of transcribing equipment.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. The following methods of evaluation are suggested:

1. Commercially prepared tests supplied with individualized instructional materials and programmed materials.
2. Business entry-level tests obtained from local agencies.
3. Teacher-made short-answer, essay, and problem-solving tests.
4. Production tests evaluated on basis of mailability.
5. Evaluation of oral participation, discussion, homework, and attitude.
6. Student-teacher conferences.
7. Evaluation of promptness, neatness, accuracy, and legibility in assigned work.
8. Business simulations and projects.
9. Observation of skills in making decisions and setting priorities.
10. Evaluation of language arts and communication skills exhibited in oral and written reports.

INSTRUCTIONAL MEDIA: The media may include current textbooks, programmed materials, pamphlets, style guides, workbooks, business letterheads, transparencies, films, filmstrips, cassettes, charts, posters, dictionaries, stenographer's reference manuals, bulletin board displays, magazines, and manufacturers' equipment guides.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lecture, class discussion, guest speakers, self-paced instruction, programmed instruction, learning activity packets, simulations, integrated projects, quest projects, and rotations.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.

Word Processing Semester 2

COURSE DESCRIPTION: This course expands the concepts and varied components of word processing to give the student a broad overview of the communications area and an introduction to the qualifications and responsibilities of a supervisor, an administrative assistant, a correspondence secretary, and an administrative secretary. Electronic and magnetic control word processing equipment is utilized in this course.

PREREQUISITE: Word Processing, Semester 1

OBJECTIVES: At the end of study in Word Processing, Semester 2, the student will:

1. Operate a proportional spacing typewriter to produce mailable copy from recorded media.
2. Perform supervisory duties.
3. Operate magnetic control word processing equipment.
4. Format documents.
5. Create automatic documents.
6. Log magnetic media and prepare for storage.
7. Demonstrate desirable personal traits necessary for employment in the communications area.

CONTENT OUTLINE AND SUGGESTED TEACHING/LEARNING ACTIVITIES:

<u>Outline</u>	<u>Activities</u>
1. Proportional Spacing Typewriter a. Operation b. Applications	. Identify and discuss the unique features of the proportional spacing typewriter.
2. Supervisory Duties a. Decision making b. Problem solving c. Originating documents d. Evaluating employee production	. Use teacher and/or student demonstrations of equipment operation. . Using a rotation plan, have each student complete a self-instructional unit on the operation of the proportional spacing typewriter.
3. Electronic and Magnetic Control Word Processing Equipment a. Operation b. Applications c. Simulation	. Apply language arts skills in proportional spacing typing applications.
4. The Word Processing Center a. Organization b. Applications - actual and simulated	. Proofread, edit, and prepare mailable copy. . Discuss traits and attitudes needed by supervisors. Have each student complete a self-analysis using list prepared from class discussions.

OutlineActivities

- . Invite word processing center supervisor from local business to discuss responsibilities of the position and qualifications for employment. (Or have student(s) interview supervisor(s) and report to class.)
- . Discuss factors to be considered in setting priorities.
- . Practice making decisions and setting priorities with situations from everyday life.
- . Practice making decisions and setting priorities through the use of in-basket projects.
- . Use role-playing to demonstrate personal qualities and attitudes needed by a supervisor in carrying out responsibilities.
- . Have each student supervise a laboratory activity involving a small group, such as a simulation.
- . Use teacher and/or student demonstrations of equipment.
- . Practice recording onto magnetic tape or card while typing.
- . Practice playback of prerecorded tape or card.
- . Practice error correction and search operations.
- . Format documents by using special coding to center, underline, and tabulate automatically.
- . Practice adjusting prerecorded copy.
- . Insist on use of dictionary or other appropriate reference to ensure accuracy in hyphenations.

OutlineActivities

- . Discuss and demonstrate the difference between paper revisions and permanent media revisions.
- . Practice performing paper revisions without change in basic prerecorded magnetic tape or card.
- . Practice permanently modifying, revising, and editing prerecorded materials.
- . Practice skip and delete operations.
- . Use a commercially or teacher-prepared task simulation involving the preparation of a properly coded document and a set of variables to be merged.
- . Use a commercially or teacher-prepared task simulation involving the preparation of a properly coded basic information tape or card with a number of variables to be inserted.
- . Practice logging magnetic media --form paragraphs, form letters, documents--for future retrieval.
- . Practice preparing magnetic media for storage.
- . Complete simulated project using word processing applications and equipment.
- . Apply language arts skills in activities and projects using word processing equipment.
- . Transcribe from a transcribing machine onto a magnetic tape or card; playback transcribed copy, edit, and paper revise final copy.

OutlineActivities

- . Arrange a tour of a local word processing center.
- . Set up a word processing center in the laboratory.

EVALUATION: Various procedures should be developed by the instructor to obtain pertinent information concerning the achievement and progress of students. The number and variety of methods used will depend upon the initiative and resourcefulness of the instructor. The following methods of evaluation are suggested.

1. Publishers' and manufacturers' tests supplied with instructional materials.
2. Teacher-made short-answer, essay, and problem-solving tests.
3. Production tests evaluated on basis of mailability.
4. Evaluation of oral participation, discussion, homework, and attitude.
5. Student-teacher conferences.
6. Evaluation of promptness, neatness, accuracy, and legibility in assigned work.
7. Business simulations and projects.
8. Observation of skill in carrying out supervisory duties and responsibilities.
9. Evaluation of language arts and communication skills exhibited in oral and written reports.

INSTRUCTIONAL MEDIA: The media may include current textbooks, programmed materials, style guides, workbooks, business letterheads, transparencies, films, filmstrips, cassettes, charts, posters, dictionaries, stenographer's reference manuals, bulletin board displays, magazines, and manufacturers' equipment guides.

INSTRUCTIONAL APPROACHES: Instructional approaches should include a combination of individual and group activities using a variety of techniques. These techniques may include lecture, class discussion, teacher/student demonstrations, guest speakers, self-paced instruction, programmed instruction, learning activity packets, field trips, simulations, integrated projects, quest projects, and rotations.

FACILITIES, EQUIPMENT, AND SUPPLIES: See Section VIII of this guide.